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ABSTRACT

This planning workbook is the first of its kind, written in 1969 to explain the process of career development and to help agencies put the process into practice. This guide is divided into the following sections: (1) The Need for OEO/CAP Career Development; (2) The Career Development Process (Task Identification, Functional Job Analysis, Institutionalizing Career Development, Development of Career Ladders, Training and Education, Selection and Recruitment, Training and Supportive Services, Involvement of Other Resources, and Budget and Finance); (3) Career Development in OEO/CAP: An Agency Developmental Process; (4) Milestones for Implementation--The General Procedural Model; and (5) Tools for Planning, Implementation, and Evaluation of Performance. Also included are an introduction, resource materials (Career Development for Program Assistants, The Training Component, Evaluating Performance and Progress), references, and Task Completion Forms and blank planning charts. (Author/JLL)

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CAREER DEVELOPMENT PLANNING WORKBOOK

for

OEO-CAP

Project UPREACH

September 1969

399-5013

Developed through contract with the Office of Economic Opportunity

by the

NATIONAL INSTITUTE FOR NEW CAREERS
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A Note to Workbook Users . . .

This workbook is the first of its kind, written to explain the process of career development and to help agencies put the process into practice.

Much has been written about career development, under many different names, through the years. But most of what has been written has consisted of general notions about the organization of workers for the greatest productivity and about the requirements and credentials necessary to hold jobs. Little has been said about the process through which people are assisted in preparing themselves for career advancement. The New Careers approach to career development is intended to help people, primarily the disadvantaged, find new ways to careers.

This book is designed to help you understand the approach to career development that has derived from New Careers experience and to put it into practice. We have attempted to clearly distinguish the various processes involved in career development as well as the ways in which they are related to each other and the general order in which they should be conducted.

The workbook will be used in workshops led by technical assistants on our staff whose purpose is to help you conduct career development. Since the workbook has not been field tested, the technical assistants conducting the workshops may find as they work with you that parts of the manual need revision. For that reason, the workbook has been bound with metal fasteners so that you may insert new pages if we find it necessary to make changes.

We do not consider this a finished product. Your experience with it will help us to further develop and refine it so that it can be optimally useful. We welcome your comments about the workbook; they will help us ultimately to prepare the most useful document possible.

The National Institute for New Careers,
University Research Corporation
Washington, D.C.

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INTRODUCTION

This planning workbook has been prepared to help Community Action Agencies plan and conduct career development activities.

Career development is the term used to refer to a process which includes:

- Defining and establishing the specific jobs required to carry out the agency's purposes and objectives.
- Determining the amount and kinds of experience, training, and education required to perform each job -- ranging from jobs at the entry level (for which no previous training is required) to those at the professional level.
- Recruiting and selecting poor people to fill the jobs defined.
- Helping people already employed to advance to higher level jobs.
- Providing the on-the-job training and experience required to prepare people to perform at higher levels on the career ladder.
- Ensuring that educational courses needed are provided in local educational institutions.
- Providing released time from work with pay for people to take courses in educational institutions.
- Providing the supportive services that people need to permit them to become effective workers.

The processes outlined in this workbook can be used on a long-term basis to increase the participation of the poor in the agency. As existing staff members are upgraded through career development activity, other poor people can assume the jobs they held.

The *Career Development Planning Workbook* was developed for use by 350 CAAs taking part in a career development program (Project UPREACH). But it has been designed so that agencies not participating in the special program can also use it to plan their career advancement effort.

Using the workbook

The workbook can:

- Help CAA career development staff and Board Personnel Committees understand career development and the order in which the processes of career development should be conducted.
- Help local committees design individualized plans for conducting career development.
- Provide tools that can be used by local agencies to:
  1. Identify long-range goals of career development.
  2. Make a projection of activities in a rational time sequence for their own career development programs.
  3. Perform the activities projected.
  4. Evaluate the progress and quality of the activities conducted.
  5. Determine the need for technical assistance.

The 350 agencies participating in the special career development effort will use this workbook at six regularly scheduled regional workshops. The workshops will be conducted for OEO/CAP by the National Institute for New Careers, University Research Corporation (URC). Participating agencies will also receive technical assistance in career development from URC through onsite visits, correspondence and telephone calls as well as a regularly published bulletin and information

services. The bulletin and information services will be distributed to nonparticipating CAP agencies to share the benefits of the workshop activity, planning, and technical assistance.

User's guide to the workbook

The first four chapters provide basic information required to conduct career development activities.

The OEO legislative mandate and the need for CAA career development are briefly discussed in Chapter One.

The major processes of career development are described in Chapter Two. Worksheets and pages for notes are included in this section for use at the workshops and in local planning meetings.

In Chapter Three, the specific application of the process to OEO/CAP activities in Project UPREACH is outlined.

Then, in Chapter Four, suggestions are provided for structuring and conducting the career development program. Milestones will be set for the completion of activities. A PERT chart* is provided to show how the career development process would be phased under ideal conditions. This chart will serve as a general procedural model for local planning efforts. Several blank charts are provided for use by local career development staff in planning and projecting activities to be accomplished during the periods between workshops.

On the first chart, the staff (with the help of URC technical assistants) can plot all tasks to be completed, establishing dates for

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*PERT refers to the Program Evaluation and Review Technique, a method developed by the Navy Special Projects Office for scheduling and budgeting resources to accomplish jobs on schedule. For more information, see Richard I. Levin and Charles A. Kirkpatrick. Planning and Control with PERT/CPM. New York: McGraw-Hill Book Co., 1966.

the completion of each. This chart will serve as the local overall planning guide.

The next five charts will then be used at the five follow-up workshops to assess the progress that has been made, to call attention to local problems, and to plan the activities to be conducted during the following two months.

Task completion forms are provided in this workbook. Each CAA Career Development Committee or Board Personnel Committee will send one of these to the National Institute for New Careers at two-week intervals. The task completion forms will serve two purposes:

1. Local career development staff can use them to evaluate their progress, comparing work actually accomplished with the work goals previously charted.
2. The National Institute for New Careers will use the forms to determine which CAAs need technical assistance, phone calls, or other help. The Institute will also use the forms to help determine the content to be covered in successive workshops.

The task completion forms are not judgmental. No attempt will be made to use them to "grade" or to rate in quantitative or qualitative terms the progress made by individual projects. No stigma will be attached if a project reports tasks uncompleted within a specific time. Such a report will simply indicate that particular tasks need attention during technical assistance visits.

A note about technical assistance

Technical assistants from the National Institute for New Careers (URC) will:

1. Help local staff understand the processes of career development.
2. Assist local staff in explaining the processes to other staff members, to the Governing Board, to other agencies, to the community, and to career trainees.
3. Provide training in the follow-up workshops that will help local staff deal with specific problems encountered.
4. Help local staff establish goals, evaluate progress, and make recommendations for future activity or changes in procedure.

URC technical assistants view their role as that of working with each local project to achieve effective career development. The "TAs" with whom you will be working are not monitors or judges. Their intention is simply, as their job title suggests, to provide each project the technical assistance needed to conduct successful CAA career development.

ONE: THE NEED FOR OEO/CAP CAREER DEVELOPMENT

The term, career development, refers to the process of establishing a related series of career positions and enabling persons to advance through the series on the basis of their experience, training, and education.

In addition to providing the opportunity to advance from one career level to the next, carefully structuring careers provides enormous benefits for the employing agency or firm: Rational definition of careers can lead to effective manpower use and agency administration.

What is the career development process?

In a nutshell, career development for nonprofessionals and professionals consists of these general processes which will be described more fully in Chapter Two:

- Defining and establishing a series of jobs or careers for agency employees.
- Recruiting and selecting new persons for career training or identifying present employees for upgrading.
- Provision of on-the-job training, skill training, basic education, higher education, and supportive services.
- Ensuring that a system is provided to promote the upward mobility of employees from one job level to another with appropriate salary increases, promotions, and increased responsibilities.

Career development has long been a basic tenet of American business and industry. The concept of developing careers -- rather than dead-end, menial jobs -- to permit disadvantaged persons to obtain satisfying

employment and to enable persons already employed to be upgraded has been widely accepted in recent years in many kinds of antipoverty activities. Massive efforts are being made to develop careers and to provide the related training, educational, organizational, and structural supports needed to create new kinds of careers for the poor.

The mandate for OEO Career Development

Providing an ongoing career development program can meet two basic OEO goals.

First, it can provide a way out of poverty for those who move into the careers created. Secondly, this involvement of the poor can help increase the effectiveness of OEO programs among the people they serve. Many poverty area residents will more readily accept services or take part in antipoverty efforts when their neighbors have a voice and status in program operation.

The establishment of career development programs for the poor -- in OEO terminology, "nonprofessionals" -- is one of the central operating principles of the Community Action Program. This stems from a basic mandate of the Economic Opportunity Act:

> Sec 223 Title IIB - In the conduct of all component programs under this part, residents of the area and members of the groups served shall be provided maximum employment opportunity, including opportunity for further occupational training and career advancement.
>
> Sec 201 Title IIB - The basic purpose of a CAA shall be to enable low-income families, and low-income individuals of all ages, in urban and rural areas, to attain the skills, knowledges, and motivations and secure the opportunities needed for them to become fully self-sufficient.

A number of policy statements* for OEO/CAP nonprofessional career development require:

- That grantees provide employment, training, and career advancement opportunities for poor people, and
- That the career development system which accomplishes this include staff positions which are directly involved in the planning, budgeting, funding, conduct, administration, and evaluation of programs.

The Community Action Program has pioneered in employing nonprofessionals in the human services -- health, education, and welfare, for example -- fields in which jobs were traditionally reserved exclusively for professionals. OEO/CAP is currently the largest user of these nonprofessionals. Community Organization, Foster Grandparents, Head Start, Housing Services, Comprehensive Health, Emergency Food and Medical Services, Legal Services, and Migrant Education are just some of the programs and functional areas in which nonprofessionals are employed in significant numbers. Latest reports indicate that approximately 170,000 nonprofessional positions now exist in these programs. Approximately 68,500 of these positions are filled full-time on a year-long basis. Most of the people holding these positions are doing work that has in the past been performed only by accredited professionals.

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*E.g.: CA Memo 23A and OEO Instruction 6005-1 -- Participation of the Poor in the Planning, Conduct, and Evaluation of CAA Programs.

Why career development?

Aside from the legislative mandate for career development, other vitally important factors give meaning to the career development program. As has been so successfully demonstrated in New Careers programs and in related training efforts, the poor, because of their familiarity with the community and the needs of its residents, and simply because they are poor themselves, are ideally equipped to:

1. Provide a bridge for community-agency understanding.
2. Interpret the needs of the poor to the agency and help professional staff better deal with the needs identified.
3. Play an advocate's role in interpreting the agency to the community and urging people to use the services provided.
4. Relieve the professional workers of many time-consuming person-to-person tasks essential to the provision of human services.
5. Help improve the overall quality of services provided by the agency.
6. Help increase the amount of community participation in agency activities.

Employing the poor within the agency is an effective tool for alleviating poverty. The income it provides for the nonprofessional helps him escape from poverty's confinement. One of the most important points made in large scale studies of the nonprofessional in CAP is that CAA jobs are "more than just jobs" to the poor. The chance to engage in meaningful occupations directly involved in eradicating poverty from the lives of their friends and relatives helps the poor person develop psychological and intellectual attitudes which are indispensable in breaking the poverty cycle.

But, bringing the poor into the system is just one part of career development; changing the structure of the job ladder to permit their entry--when it is correctly done--inevitably leads to more productive use of staff at all levels.

After new jobs and careers at various levels have been defined, career development is essentially a continuing process which permits entry and upgrading of employees through training, education and work, arranged to help people develop skills, experience and knowledge leading to higher levels of responsibility, status and pay. In business and industry, it has traditionally been the responsibility of the individual employee to secure and finance his education and training; in programs such as OEO/CAP, New Careers, and the like, the emphasis is shifted. Much of the necessary training and education are provided as part of the work experience itself and in inservice training activity or through released time for educational purposes.

Historical perspective

Career development in OEO began long before official guidelines for Project UPREACH were written. OEO has provided career mobility for people from disadvantaged backgrounds who have proved their capacity on the job and their motivation for training.

While career development is generally associated with the experimental work done in New Careers in the 1960s, it really goes back much farther in time. The idea of job redesign has been widely known for at least 30 years. During World War II, for example, leaders in business and government, faced with shortages of skilled manpower, realized that intelligence, ability, and problem-solving capacity could be found at all levels of society.

Career development is complex, and many kinds of interrelated processes must be conducted to achieve it. Success depends largely on understanding the purpose of each activity, the methods to be used, and the sequence in which activities should occur.

It is hoped that this workbook will remove as many of the headaches as possible for career development personnel, and make possible the achievement of an ongoing system of career development for the poor within local Community Action Agencies.

TWO: THE CAREER DEVELOPMENT PROCESS

Career development for the disadvantaged is still in its formative stages, but its goals are well defined and enough experience has been accumulated to clearly identify many of the techniques and processes involved.

This chapter contains an outline and brief description of the processes involved in career development. The outline should not be interpreted as dogma, but rather as a general guide for achieving effective results.

The order in which the career development processes are conducted is important. For example, recruitment of entry-level trainees should not be started until the jobs to be performed are clearly identified. Recruiting too early may result in inappropriate selection of personnel or mean that people expecting to be trained will have to be rejected. Consequently, job definition must precede recruitment.

But, not all processes of career development can be conducted in a chronological order. Inservice training for the CAA staff who will provide entry-level training can be started while recruitment and selection is being conducted, and training for the upgrading of persons already employed can be started before entry-level training begins. In actual practice, there will be overlapping in time of the performance of some processes. Do not be misled into thinking that the processes must be carried out in the order in which they are described in this chapter or that each process must be entirely completed before another is begun.

Process A: TASK IDENTIFICATION

Analysis of services and activities to be conducted by the agency.

Before actual job slots can be established, there must be an understanding of all the services, functions, and activities of the agency. Many job development programs fail because agency goals and purposes are not carefully identified, agreed upon, and understood.

Getting a total picture of the tasks to be performed is essential to formulating job descriptions since each job must be defined in relation to the overall tasks to be performed by the agency.

When you are outlining all the tasks to be performed by your agency, take time to consider both those already performed and those that should be added. For example, the staff in a health agency may have given up on providing hearing tests for toddlers because of the lack of staff and because the professionals' time is needed for other purposes. Having nonprofessionals available who can conduct hearing tests may mean that this testing can be put back in the overall agency task outline. Rational analysis of agency goals in this situation might include agreement to put auditory testing back into the agency's statement of tasks to be performed.

There must be agreement among agency staff about the purposes of the agency and the tasks it is to perform--otherwise, nonprofessionals and staff at all levels may be placed in conflict situations when they are expected to perform tasks which some staff members consider nonessential.

All members of the agency staff--at all levels--must be consulted in efforts to arrive at a total picture of all tasks to be performed. One

person--perhaps the chairman of the Board Personnel Committee or the Career Development Officer--should have responsibility for collecting information about the tasks to be performed. Secretaries can assist in listing and typing statements that outline all the tasks to be performed.

Process A: TASK IDENTIFICATION--Discussion:

1. What persons in your agency should be consulted to help identify the total spectrum of agency tasks?

2. What methods will you use to involve these persons in task identification? (Staff meetings, memos, personal contact, etc.)

3. How much time do you plan to devote to this process?

4. What methods will you use to obtain agreement among staff about the scope of tasks to be performed?

5. What particular problems with respect to task identification do you anticipate?

6. What tasks can you think of already that your agency is failing to perform?

Process A: TASK IDENTIFICATION--Workshop Notes:

Process B: FUNCTIONAL JOB ANALYSIS

After all tasks have been identified, they must be analyzed to form specific jobs at all levels of the agency. Job analysis has been defined by the U.S. Department of Labor as:

> The process of determining, by observation and study, and reporting pertinent information relating to the nature of a specific job. It is the determination of the tasks which comprise the job and of the skills, knowledges, abilities, and responsibilities required of the worker for successful performance and which differentiate the job from all others.*

For the career development team in the Community Action Agency, this process consists of dividing up and parceling out the tasks defined in Process A among jobs at various levels--entry, intermediate, senior and professional--of agency operation.

Job analysis does not always mean that jobs have to be redesigned. Rather, emphasis should be placed on determining the principal duties of a job, the nature and level of skill and ability required to perform these duties, and the relationship of each job to all others. Salary levels can be determined in relation to the job responsibilities established. The human characteristics needed to adequately perform the job must also be considered--for example, particular skills, personality traits, and the like. Training activities can later be developed to permit people to develop these skills.

Techniques of functional job analysis

Career development staff members need to be familiar with the techniques and approaches to functional occupational analysis which include:

*Department of Labor, United States Employment Service, Occupational Analysis and Industrial Services Division, Training and Reference Manual for Job Analysis, June 1944, p. 1.

1. Analysis of functions and roles currently performed and necessary to the achievement of tasks outlined in Process A.
2. Consideration of skills, experience, training, education, and other criteria of performance required to perform at the various job levels.
3. Consideration of methods for meeting program goals in the most efficient and effective manner to the benefit of the client population.

Functional job analysis cannot be conducted by the career development or personnel committee in a vacuum. An orderly system must be developed for obtaining information about jobs from nonprofessionals already working as well as from professional staff. Interviews and questionnaires can be developed to obtain this information. The information about a job obtained from a nonprofessional staff member through these processes can then be matched with the information obtained from professionals. The views of both should be looked at in relation to the goals and objectives of the agency and in terms of the tasks outlined in Process A.

Finally, specific jobs, each including clusters of related tasks to be performed, must be established. The job information obtained should be recorded on two forms to make a permanent record--the job description and the job specification. (These forms will be used in developing training content appropriate to the job descriptions.) The job description will include information such as: job title, job duties, needed tools and equipment, needed materials and forms, required supervision, relationships of person holding the job with other staff.

The job specification can be considered a statement of the human qualifications needed to do the job. Items to be included on the job specifica-

tion include: amount and kind of education and training needed; experience; requirements for personal judgement, initiative, physical skills, communication skills, emotional characteristics, etc. The job specification, Beach points out, "is actually derived from the description by translating the job activities and requirements into particular skills and abilities."*

*Dale S. Beach. Personnel: The Management of People at Work. New York: The Macmillan Co., 1967, pp. 167. (Chapter 7, "Job Organization and Information," was used as a reference in preparing this discussion of functional job analysis, and the work by Beach is recommended as an excellent resource for the study of job analysis.)

SAMPLE JOB DESCRIPTION

Title : Day Care Mother Aide

Immediate Supervisor : Teacher Director

Salary Range : $1.60-$2.00/hour

Function :

The Mother-Aide will assist the teachers in the conduct of the daily program and will substitute in the absence of a teacher. As a resident of the community in which the center is located, the Mother-Aide will assist in building strong communication lines between the center and the residents.

I. Description of the duties and responsibilities.

A. Assisting in the center:

1. To prepare the classroom for such activities as music, art, science, meals or naps and to help the children learn by letting them do as much of the work as possible.

2. To assist the teacher in maintaining bulletin boards and other displays.

3. To read to the children.

4. To watch the children on the playground and to help them learn to use the equipment and play together.

5. To encourage children to participate in classroom activities.

6. To assist the teacher on field trips and help make the trip meaningful for the children.

7. To work primarily with the teacher director, but also with other teachers or the cook as directed.

8. To substitute when a teacher is absent.

B. Training:

1. Through participation in inservice training provided by the program, to develop an understanding of the aims and methods of early childhood education.

2. To attend workshops and inservice meetings when so directed.

C. Public Contact:

1. To participate in the parent involvement group at the center.

2. Through informal contact with community residents to spread information on the operation and goals of the center.

3. To assist in recruiting volunteers for the center.

II. Desired Qualifications:

The Mother-Aide should be the mother of a child enrolled in the center and resident of the community in which the center is located. If there are no mothers applying, then other residents of the community could be considered. A Mother-Aide should be able to read and write well enough to benefit from the inservice training program. She should be capable of adjusting to the flexibility of the program.

SAMPLE JOB SPECIFICATION

Title:	Day Care Mother Aide
Mental Development:	Ability to follow directions given by the teacher for the care and supervision of children; ability to make such decisions on her own, interest in caring for and working with children.
Previous Experience:	Child care -- experience gained as a mother or through baby sitting or extensive care of children.
Dexterity:	Must be able to use materials such as scissors and paste safely and creatively and able to move quickly and energetically to care for children or to play games with them.
Adaptability:	Must not be disturbed by children's noise and activity and must be able to work with children in a variety of settings -- in the classroom or activity room, on field trips, playing outdoors, etc.
Analysis and Judgement:	Must be able to determine children's needs for supervision or assistance. Must know how to set limits for the children without becoming overly rigid or authoritarian.
Physical Demand:	Must be able to be active with the children all day if required. Must also be able to perform "quiet" activities such as reading stories to children or plan a bulletin board display.
Responsibility:	Responsible to teacher -- must follow teacher's instructions, but is also expected to make suggestions and participate with the teacher in planning activities. In charge of children when teacher is absent.
Contacts with Others:	Will have to exchange information with visitors, parents, and community representatives. May be sent to make home visits to share information with mothers or to find out why a child has not been attending the day care center.
Working Conditions:	Normal school conditions.

(SAMPLE)

INDIVIDUAL JOB ANALYSIS QUESTIONNAIRE*

Name_____ Department_____

Payroll Title_____ Name, Immediate Supervisor_____

Instructions: Please read the entire form before making any entries. Answer each question as accurately and carefully as possible. When completed return this form to your supervisor. If you have any questions ask your supervisor.

Your Duties

What duties and tasks do you personally perform daily?

What duties do you perform only at stated intervals such as semi-weekly, weekly or monthly? Indicate which period applies to each duty.

What duties do you perform only at irregular intervals?

Supervision of Others

How many employees are directly under your supervision? (List job titles and number of people assigned to each job.)

Do you have full discretionary authority to assign work; correct and discipline; recommend pay increases, transfers, promotions and discharge; and to answer grievances?

Do you only assign work, instruct, and coordinate the activities of your subordinates?

Materials, Tools, and Equipment

What are the principal materials and products that you handle?

List the names of the machines and equipment used in your work.

List the names of the principal hand tools and instruments used in your work.

What is the Source of Your Instructions? (e.g. oral, written)

*From Beach, p. 174-5.

What Contacts Are You Required to Make with Persons Other Than Your Immediate Supervisor and Departmental Associates?

a) Give the job titles and the department or organization of those with whom you deal.

b) Describe the nature of these contacts.

Decisions

What decisions do you have to make without consulting your supervisor?

Responsibility

a) Describe the nature of your responsibility for money, machinery, equipment, and reports.

b) What monetary loss can occur through an honest error?

Records and Reports

a) What records and reports do you personally prepare?

b) What is the source of the data?

Checking of Your Work

a) How is your work inspected, checked or verified?

b) Who does this?

Physical Requirements

a) What percentage of the time do you spend in the following working positions?

Standing___%. Sitting___%. Walking about___%.

b) What weight in pounds must you personally lift and carry?___pounds.

c) What percentage of the working day do you actually spend lifting and carrying this weight?___%.

d) Are any special physical skills, eye-hand coordination, and manual dexterity skills required on your job?

Working Conditions
Describe any conditions present in the location and nature of your work, such as noise, heat, dust, fumes, etc., which you consider unfavorable or disagreeable.

Hazards
Describe the dangers or accident hazards present in your job.

THIS PORTION IS TO BE FILLED OUT BY YOUR SUPERVISOR.

Education Requirements
What is the lowest grade of grammar school, high school, or college required of a person starting in this job?

Previous Experience

a) What kind of previous work experience is necessary for minimum satisfactory performance for a new employee on this job?

b) Give the length of experience required.

Training
Assuming that a new employee on this job has the necessary education and experience to qualify for the work, what training is necessary after the employee is on the job to achieve an acceptable performance level? (Specify training needed and period of time to acquire it.)

Date _____ Signature of Supervisor _____

A Glossary of Functional Job Analysis*

Job Title and Location--These properly designate and identify the job. Some standardization and consistency of job titling is considered advantageous.

Job Summary--This is included in most job descriptions to give the reader a quick capsule explanation of content of job. Usually one or two sentences in length.

Job Duties--Usually a comprehensive listing of the duties is included together with some indication of the frequency of occurrence or percentage of time devoted to each major duty. Always include what the job holder does as well as some indication of how he performs the tasks.

Relation to Other Jobs--This item helps to locate the job in the organization by indicating the job or jobs immediately below the one being analyzed and the one immediately above it in the hierarchy.

Supervision Given--For those jobs possessing a supervisory responsibility an explanation of the number of persons directly supervised and their job titles is given.

Mental Complexity--This and similar terms, such as initiative, ingenuity, judgment, resourcefulness, and analytical requirements, are used to cover the degree of mental difficulty and skill required by the job.

Mental Attention--This factor relates to the degree of mental concentration and alertness required.

Physical Demand--Commonly included under this heading is an enumeration of the types of physical activity and effort required. It may involve such actions as walking, lifting, bending, climbing, and sitting.

Physical Skills--Examples are manual dexterity, eye-hand-foot coordination, and color discrimination.

Responsibilities--There are many kinds of responsibility that may be assigned to a job holder. Examples of these are responsibility for the supervision of others, responsibility for product, process, and equipment, responsibility for safety of others, responsibility for confidence and trust, and responsibility for preventing monetary loss to the agency. For certain jobs, such as high-level management ones, the responsibility factors weigh heavily in establishing the pay and status of the work.

Personal Characteristics--For certain jobs such personality attributes as personal appearance, emotional stability, maturity, initiative and drive, and skill in dealing with others are important.

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*From Beach, p. 177.

Working Conditions--This item pertains to the environment in which the job holder must work.

Hazards--The conditions of work may be such that the job holder faces certain hazards to life and limb. The nature of the hazards and their probability of occurrence must be considered.

Process B: FUNCTIONAL JOB ANALYSIS--Discussion:

1. What methods will you use to insure that people already employed in your agency--from entry-level to top-level--participate in job analysis?

2. A sample individual job analysis questionnaire is provided on the following page. This is the kind of questionnaire often used in industry. How might it be modified to be of use in your agency?

3. Who will make the final decisions with respect to job analysis?

4. How will you announce the results of job analysis to your staff?

5. What problems do you anticipate in performing the process of functional job analysis?

6. Definitions of terms used in functional job analysis are provided on page 34. You may want to modify these to fit your local needs and circulate them to your committees and staff.

Process B: FUNCTIONAL JOB ANALYSIS--Workshop Notes:

Process C: INSTITUTIONALIZING CAREER DEVELOPMENT AND RESULTS OF JOB ANALYSIS

Community Action Agencies can significantly increase the quality and quantity of their services by (1) redesigning and reorganizing their systems of manpower utilization; (2) developing paraprofessional jobs; and (3) providing programs of career development and training at all levels. In particular, services can benefit, and new and meaningful career opportunities can be developed for the unemployed and underemployed through functional job analysis or restructuring of roles and positions in order to:

- Fit qualifications and skills to the jobs defined.
- Minimize underuse or overuse of staff and resources.
- Develop new kinds of roles and positions at various levels.
- Improve the use of professional staff through increased emphasis on supervision, training, and use of the "team" and "program" approach to services.

Therefore, the career development team must help professionals understand how they will benefit from functional job analysis. A caseworker who feels threatened by the idea of relinquishing some of her responsibility for making referrals or for completing the referral process through contacts with the client and the agencies involved, can be helped to understand that permitting a trained nonprofessional to perform this task will give her more time for providing counseling and ensuring that rehabilitation of the client occurs.

Professionals also need to understand that analyzing and redefining their roles is essential to the establishment of a succession of careers in meaningful progression from entry to professional level. The roles of nonprofessionals cannot be defined without consideration of professional roles. In the career development program, training and

upgrading for nonprofessionals is emphasized, but upgrading and increases in salary for persons at all levels is bound to occur as a result of this process. Job analysis results in a determination of the relative worth of jobs within the organization; this can be used to determine salary scales.

Descriptions should be carefully written for jobs at all levels, and distributed to all staff to ensure that everyone understands what particular tasks each professional and nonprofessional staff member is to provide and how his own role relates to the others.

Financial guidelines established by the operating agency must be considered in relation to job and career development. In this case, OEO financial guidelines should be adhered to at all times.

Process C. INSTITUTIONALIZING JOB ANALYSIS--Discussion:

1. How will you announce the results of job analysis to the CAA staff? What methods will you use to ensure support and cooperation?

2. What will you do if you find that a professional and a nonprofessional on your staff disagree about the tasks to be performed by the nonprofessional?

3. What problems do you anticipate from the professionals on your staff? How can you help them overcome feelings of being threatened by the removal of nonprofessional tasks from their job descriptions?

4. Who will have responsibility for actual preparation and distribution of job descriptions and specifications?

Process C: INSTITUTIONALIZING JOB ANALYSIS--Workshop Notes:

Process D: DEVELOPMENT OF CAREER LADDERS

Nothing is more critical to effective career development than the creation of realistic career ladders.

The end result of functional job analysis is the development of logical relationships and progressions between jobs--the establishment of career ladders and of career mobility acquired through training and experience. This includes the development of a career structure that facilitates the movement--through additional training, experience, and education--of a beginning aide or maintenance worker with less than a high school diploma up to a second, third, fourth step and higher. It includes achievement of degrees or certificates appropriate to each position through a coordinated program of work, training and education (with provision for released time). It also includes provision of opportunities and incentives for persons at the professional level to increase their skills, learn to function effectively in the context of a team or program, and/or learn to effectively supervise, train, and utilize other staff members functioning at other levels.

There are few systems today in which a person with motivation and ability, beginning at the least skilled occupation, can obtain additional training and education, and use his accumulated experience to move upward to positions of greater responsibility, specialization, and function--without leaving income-producing work for school, overcoming handicaps and prejudices, and having to study much that he has already learned in order to conform to the ritual of education. Such opportunities must be provided for community residents to participate in and develop careers in the service system of their own community. Development of careers

and services in this manner provides enormous benefits not available in the traditional model in which the middle-class professional living in the suburbs spends a minimum amount of his working time in the disadvantaged area and never really learns the life-styles of that community, thus depriving the program of efficiency and effectiveness.

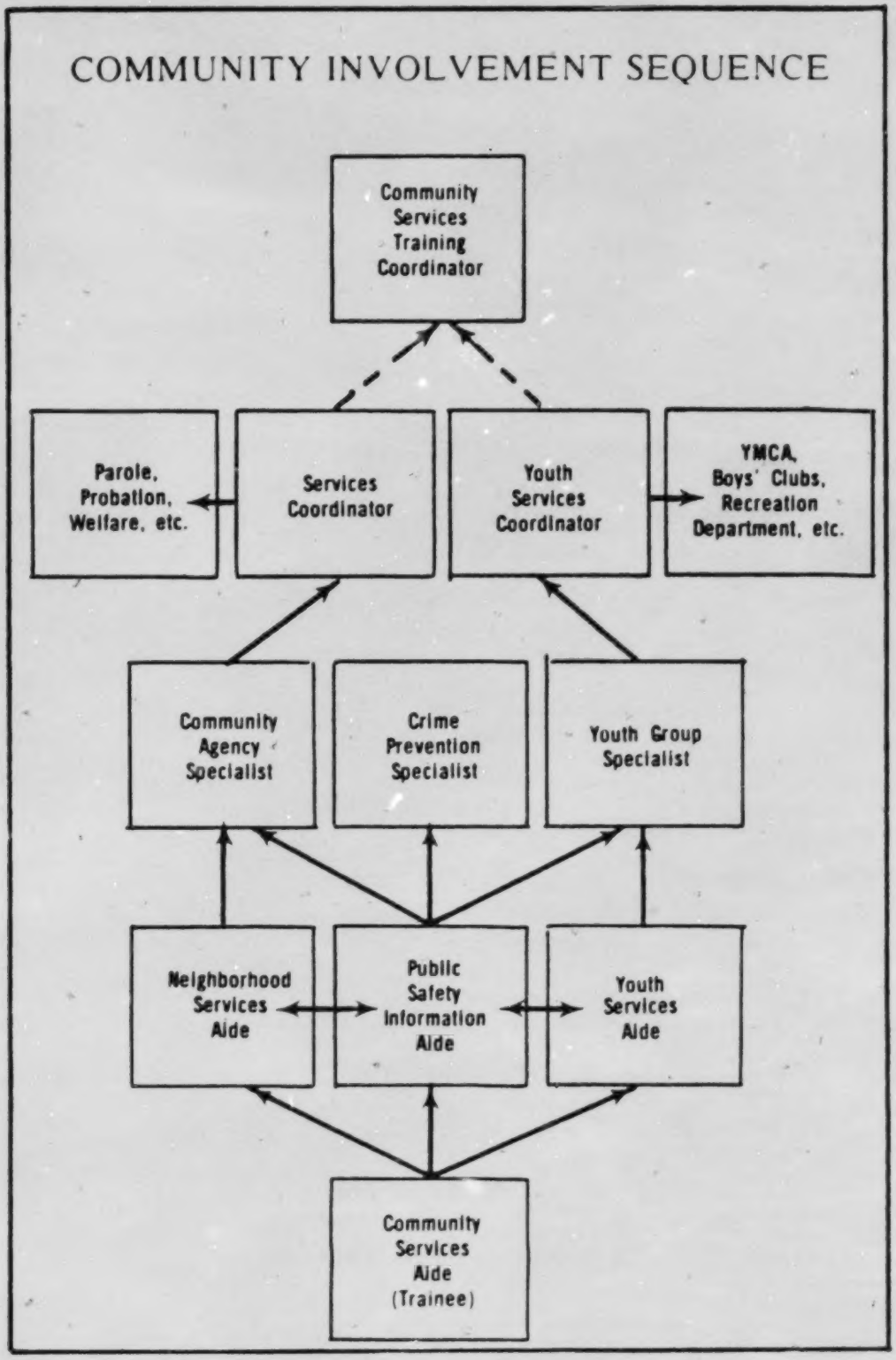
Career development staff must be helped to develop structures and linkages between jobs and position descriptions that provide for incremental advancement from one job to the next--vertically, horizontally, or diagonally. All job descriptions must be cumulatively structured to support and facilitate advancement from one level to the next with additional inservice training, education, and work experience.

Executive personnel need help in understanding that career ladders and the qualifications, skills, and tasks at each level should be designed to permit a person at any level to achieve the qualifications to move up or across to the next level without having to leave his job and lose his income to go full time to school. In other words, through a combination of experience, supervised and accredited on-the-job training, and released time for education, a person can acquire the necessary qualifications for advancement to the next step.

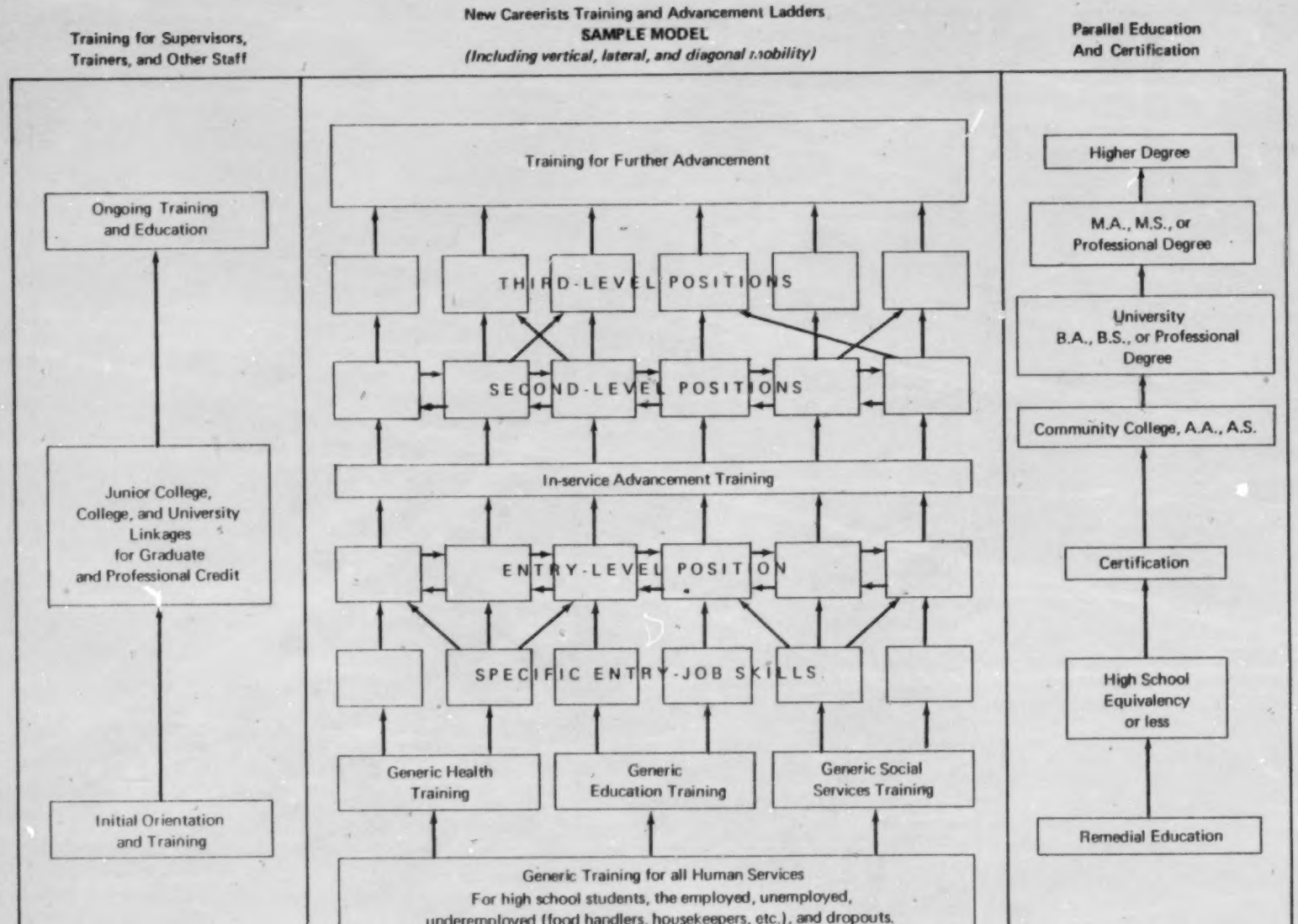
Career development and training personnel must have agency support in their work if, say, a clerical employee is to be able to advance to the level of neighborhood worker, to supervisor, to director or specialist in a particular field, by acquiring progressively greater increased work experience, education, and accreditation.

The committee should develop career ladders like the one on the following page and distribute them to the staff.

SAMPLE CAREER LADDER



PARAPROFESSIONAL CAREER LADDER PROGRESSION


Training for Supervisors, Trainers, and Other Staff
New Careerists Training and Advancement Ladders
SAMPLE MODEL
(Including vertical, lateral, and diagonal mobility)
Parallel Education And Certification
Ongoing Training and Education
Junior College, College, and University Linkages for Graduate and Professional Credit
Initial Orientation and Training
Training for Further Advancement
THIRD-LEVEL POSITIONS
SECOND-LEVEL POSITIONS
In-service Advancement Training
ENTRY-LEVEL POSITION
SPECIFIC ENTRY-JOB SKILLS
Generic Health Training
Generic Education Training
Generic Social Services Training
Generic Training for all Human Services
For high school students, the employed, unemployed, underemployed (food handlers, housekeepers, etc.), and dropouts
Higher Degree
M.A., M.S., or Professional Degree
University B.A., B.S., or Professional Degree
Community College, A.A., A.S.
Certification
High School Equivalency or less
Remedial Education

Process D: ESTABLISHING CAREER LADDERS--Discussion:

1. What are the differences between career mobility in OEO/CAP and in industry?

2. What supports will CAA staff need to provide nonprofessional staff to enhance their chances for career mobility?

3. What resources in your community should be consulted for assistance or participation in developing career ladders--schools, colleges, training agencies, employment services, etc.

4. What techniques will you use to help your staff understand the importance of career ladders?

5. Who will have responsibility for preparing and distributing copies of the career ladders developed?

Process D: ESTABLISHING CAREER LADDERS--Workshop Notes:

Process E: DEVELOPMENT OF TRAINING AND EDUCATIONAL PROCESSES

While functional job analysis is being conducted, consideration should be given to the relationship between training and the performance of roles defined.

When an entry-level job is being created, for example, this question should be asked: Will it be possible to provide in a logical fashion the amount and kind of training needed for a person learning to perform the job adequately? If it seems that training would be extremely complex or extend over an excessively long period of time, it may be that the job role is too broad and needs further definition. When jobs at higher levels are being defined, consideration must be given to the relationship between roles defined and available programs in local training institutions or junior colleges. One of the third- or fourth-level jobs defined might be that of a community development aide or urban technologist to assist in community planning efforts. A few community colleges are now offering Associate of Arts degrees in urban technology, and the job definition could be related to training provided in such a program.

Staff development and preparation for training should also be started. Inservice training and other techniques should be used to permit the staff to develop the content to be presented and to help all agency staff members understand the roles of those who will serve as trainers.

Process E: DEVELOPMENT OF TRAINING AND EDUCATIONAL PROGRAMS--Discussion:

1. Which of your staff members will be able to provide entry-level training?

2. What techniques will you use to prepare them for this role?

3. What plans need to be made for inservice training for career advancement throughout your agency?

4. Who will be responsible for inservice training?

5. What contacts do you need to make so that your staff can participate in educational opportunities provided in local institutions?

6. What problems do you anticipate in obtaining cooperation from local educational or training institutions?

7. Who will be responsible for contacts with local institutions?

8. What problems do you anticipate in securing release time for educational purposes? How will you deal with these problems?

Process E: DEVELOPMENT OF TRAINING AND EDUCATIONAL PROGRAMS--
Workshop Notes:

Process E: DEVELOPMENT OF TRAINING AND EDUCATIONAL PROGRAMS--
Workshop Notes:

Process F: SELECTION AND RECRUITMENT

As Process D nears completion, individuals outside and within the agency must be selected for training and advancement. In usual employment processes, the most highly trained, experienced, and credentialed persons are selected for employment or upgrading. In nonprofessional career development for the disadvantaged, however, emphases are shifted to include persons without the usual qualifications such as a high school diploma or previous related work experience.

Methods of recruitment and selection must be related to specific program goals and emphasis should be placed on screening people in rather than screening them out on the basis of preconceived and unrealistic stereotypes and prejudices, yet maintaining relevance to program needs.

People should be selected on the basis of their interest in the types of work to be performed. Experience in career development programs has shown that many apparently unmotivated persons in poverty need only the stimulus provided by the opportunity for a career to develop into productive and successful nonprofessional workers.

Attention must be paid to developing effective methods for predicting performance on the job. The standard and frequently unreliable paper-and-pencil tests and interviews, for example, are not nearly as effective as regular evaluations of actual job performance, role-playing, on-the-job observations, and group discussion.

Plans must be made for reaching out and identifying persons for recruitment, informing them of entry-level career opportunities, and evaluating them in terms of their ability to benefit from the career development program and contribute to CAA operations.

Process F: RECRUITMENT AND SELECTION--Discussion:

1. How will you inform local residents of entry-level job opportunities?

2. Who will be responsible for selecting trainees from among the applicants?

3. What will be your selection criteria?

4. How will you determine which existing staff members should participate in training and education for upgrading?

Process F: RECRUITMENT AND SELECTION--Workshop Notes:

Process G: TRAINING AND SUPPORTIVE SERVICES

A program must be developed to provide training at all staff levels including:

1. Special training for the supervisory and training staff.
2. Inservice training in skills and in educational programs that will lead to upgrading of present employees.
3. Entry training for new employees both as orientation and as the initial foundation of career development.

General techniques of training for all levels of personnel include:

1. Supervised, structured, and financially compensated on-the-job training from the beginning of the program.
2. Training in small groups composed of professionals and paraprofessionals to increase communication, understanding, and role definition.
3. Group counseling and training that emphasize group exchange, task-oriented problem solving, feedback of work problems and issues into the small group to be discussed and resolved through peer-group interchange and group support and validation. The "core group" has been found to provide an effective milieu for the kind of counseling and training usually needed in these kinds of programs.
4. The use of techniques such as role-playing, audiovisual materials, and related approaches to training. These have been found to be far more effective than other traditional methods which fail to emphasize active participation and learning through

Training for supervisory staff and trainers

This should include major emphasis on working effectively with and using other members of the staff team; the effective use, supervision, and training of nonprofessionals at various levels; and the development of new roles, training, and educational opportunities for these staff members themselves in line with the more effective manpower utilization made possible through the use of nonprofessionals.

Nonprofessional training model

A suggested model for entry training should include these elements:

1. Beginning training (entry-level): Combining study and on-the-job training from the very first day.
2. Training in basic issues in human services: Knowledge of the community, human growth and development, interpersonal relations and group dynamics, the world of work, the family, minority group history (as appropriate), and other areas relating to basic social knowledge and skills.
3. Basic issues in a particular occupational area: e.g.--basic principles and practices in community organization, working with residents, typical problems and approaches to identification of problems and intervention, and structure of the community.
4. Specialty skill training related to the position for which the person is being trained: For example, for the community health aide, instruction in nutrition; taking weights, measures, and temperatures; health screening techniques--all specific to the job tasks and the job description.

5. Remedial education oriented to the basic remedial skills of reading, writing, and arithmetic. These should be taught as much as possible in the context of job needs so that they are relevant and interesting, and so that they provide greater motivation: For example--remedial mathematics in the context of taking weights and measures, or figuring out food quantities or balanced meals and their dietary value. Remediation in writing and reading can be provided by using these skills in filling out forms used in day-to-day work.

Counseling

Job-oriented career counseling is an extremely important part of the development process. Staff should have some background and training in the techniques and processes of individual and group counseling. It is extremely important that this be presented not as a form of psychotherapy but rather in relation to job and career issues and approaches to coping with real problems. In this regard, group counseling has proved to be most effective since it enables the group--through the feedback of problems and issues encountered on the job and in job training--to combine the counseling and training function in a situation which is maximally supportive and is perceived by the participants as meeting their real needs.

Continuing education

Although training and education are treated separately in this outline, they are really part of the same integrated process.

The career development staff should be trained in developing relationships and joint programs with local educational institutions, both for providing instruction and for accreditation toward degrees and

certificates. Thus arrangements must be made for trainees at all levels to achieve high school equivalency, one-year community college certificates, associate of arts degrees, or baccalaureate and graduate credit at local institutions. This can be done most effectively through joint planning and curriculum development with the collaborating institution to create:

- Appropriate accredited courses, sequences, and programs of study that meet the needs of staff at these levels.
- Released time for work to attend classes.
- Arrangements for credit at the institution for supervised and structured on-the-job training as part of the work day.

Credit can usually be arranged as "practicum" with the supervisor being given an adjunct faculty appointment at the institution to facilitate course accreditation. It will be necessary to work closely with existing community educational programs being developed as part of the supplementary training program and to expand and develop the programs as necessary or to develop them where they do not currently exist. Joint relationships with educational institutions aimed at accreditation at various levels are extremely important in developing career ladders.

Teachers and instructors at these institutions, particularly those who will be training personnel from disadvantaged backgrounds, should be trained not only in the goals and needs of the particular agency where trainees will work, but also in the specific issues, problems, and techniques of educating a disadvantaged population and working with paraprofessionals.

Curriculum

Appropriate curriculum for training and education at all levels should be developed in conjunction with local educational institutions. It is important to do careful curriculum development before the program begins, but flexibility must be maintained so that changes can be made as the program proceeds and feedback comes in from other staff and from the trainees. It is particularly useful to involve paraprofessional and professional trainees in feedback discussions on curriculum and experiences in order to continually refine and improve the educational programs. Curriculum should be related to on-the-job training and emphasize small-group techniques, and a progression of skills and knowledge, so that individuals can move at their own pace without penalty, dropout, or loss of interest. Curriculum must be related to the career ladder so that it provides support for vertical, horizontal, and diagonal job mobility--that is the advantage of the hierarchy of basic instruction mentioned above. Thus, a person who moves from one job to another laterally or diagonally would not have to be totally retrained because he would already have a basic foundation in community services and basic functions in a given occupational area.

The Information Clearinghouse of the National Institute for New Careers can assist you by providing information about curriculum development and availability of actual curriculums.

Process G: TRAINING AND SUPPORTIVE SERVICES--Discussion:

1. Three different kinds of training are provided in a career development program. What are they?

2. Who will provide each type in your agency?

3. What techniques will be used in each type of training?

4. Describe the training model for nonprofessionals.

5. Why is training in basic (generic) issues in human service so important?

6. What staff members in your agency should have primary responsibility for helping establish relationships with educational institutions so that courses in the institutions can be related to the educational needs of CAA staff?

7. What curriculum materials will you need in your training programs?

Process G: TRAINING AND SUPPORTIVE SERVICES--Workshop Notes:

Process H: INVOLVEMENT OF OTHER RESOURCES

Staff will need help in understanding the relationships that must be developed with community resources such as community colleges, health associations, schools, and the like. Career development staff should help all participants in the career development program learn the best ways of interacting with these institutions and resources. This means that the career development staff must have a basic, working knowledge of such resources.

Training staff should be familiar with the resources and understand how various supportive services in the community can be used to assist staff members in the career development plans. For example, credit unions, social service agencies, health and mental health services, and educational institutions should be mobilized to help with individual and group needs.

Career development staff should not overlook the development of relationships with professional and technical associations. Certification and approval from state professional or local licensing agencies or associations may be necessary or helpful in career advancement in different fields. The local associations, professional groups, and community and government agencies can be important resources for achieving career development goals and establishing certification for various career levels. Techniques for establishing effective contact with these groups should be discussed in staff training sessions.

Process H: INVOLVEMENT OF OTHER RESOURCES--Discussion:

1. What educational resources exist in your community? What kinds of courses do they provide that will be beneficial to your staff?

2. What professional associations will you need to inform of your career development program?

3. Do you anticipate problems from these associations with respect to credentialing? What steps can be taken to prevent such problems?

4. Can staff members of public or private human service agencies be of help to you in conducting training or designing your career development plans?

5. What methods will you use to keep local agencies informed of your career development plans?

Process H: INVOLVEMENT OF OTHER RESOURCES--Workshop Notes:

Process I: BUDGET AND FINANCE

Ultimately, the life of a career development program can be assured only if the jobs, salary increases and promotional opportunities are firmly established. Whether they are depends in large measure on the budget and arrangements for financing--using not only the funds available in the grantee budget but also obtaining resources from local, public, and private institutions, including community agencies and foundations which may be able to provide either funds or job slots.

Supports must be mobilized from federal, state, and local resources. Increasingly, support and funding possibilities are available from a variety of federal, state, and local agencies. A variety of federal programs provide funds for career development, but many of them are unknown to the local CAA. Often, funds can be obtained from several sources to constitute a "funding package" that will provide broad financial support for career development. Local career development staff can contact the Information Clearinghouse, National Institute for New Careers, to obtain information about such sources.

Many times, agencies have money that could be used for career development but do not realize it. For example, funds that have been appropriated for other purposes but are not being used can be rechanneled to create new job slots or to finance inservice training. The career development committee must establish a good working relationship with the finance and budget division in order to gain its cooperation in funding.

Often, the CAA can approach local funding sources such as the United Giver's Fund to obtain financial support. Or, local businesses and

industry may contribute gifts that can be used to support part of the career development process. Good public relations--keeping the community informed about the way it can benefit from CAA career development--are required to back up any requests for funding. Keeping the newspapers and radio and TV stations informed of your career development plans--from the start of the project--is important.

Process I: BUDGET AND FINANCE--Discussion:

1. What funds do you now have for career development? Do you have enough to finance the jobs defined in the process of functional job analysis?

2. What local resources can you tap? How will you approach them?

3. Who will have responsibility in your CAA for handling the financial aspects of career development?

4. What federal funds are available that you know about?

5. How can you learn of other federal sources?

6. When should financial planning begin?

Process I: BUDGET AND FINANCE--Workshop Notes:

THREE: CAREER DEVELOPMENT IN OEO/CAP: AN AGENCY DEVELOPMENTAL PROCESS

The phases of career development outlined in Chapter Two derive from experience in the New Careers Program. Sometimes the achievements of that program are viewed as involving a complex, mysterious process, difficult to achieve. Experience has shown, however, that when the components are carefully planned, the element of mystery disappears and a successful career development program can be achieved.

The purpose of this chapter is to show how the career development process described in Chapter Two can be incorporated into CAA programs. OEO/CAP guidelines and specifications not discussed so far in this manual will be outlined. Then they will be related to career development phases or processes. The result will be a step-by-step procedural guide for program implementation.

1. Establishing the Career Development Committee

Every CAA participating in this project must establish a Career Development Committee (CDC) or designate an existing committee that can assume responsibility for career development. The size of the CAA will determine if there should be a committee organized specifically for career development or if an existing committee should serve a dual role. For agencies in rural areas, it might be advisable to have subcommittees.

Staff should be identified to plan a meeting at which a committee can be formed; this meeting should be attended by representatives of all the divisions of the CAA and delegate agencies. The local CAA

Director or another staff member should describe career development, its application to OEO/CAP and the legislative mandate for it.

The Career Development Committee is the mechanism for the implementation of the career development plan. Overall directions and staffing for the Committee is to be provided by the Career Development Officer or Coordinator elected at the initial meeting.

Membership of the CDC

OEO guidelines for CDC staffing indicate representation on the committee as follows:

- At least 50 percent nonprofessional staff. Representation from professional and nonprofessional staff, and from all program areas.
- Representation from Policy Advisory Council, groups and other pertinent CAP Committees.
- Representation on ad hoc and/or ex officio basis from community institutions related to career development in any connection.
- Staffed generally by career development officer.
- Nonprofessional and professional career development coordinators chosen to work with career development officer.
- Vote generally restricted to staff members.

2. Preplanning

A career development plan should be developed to show what the total program will look like and how the basic and specific goals are to be accomplished. During the initial planning stages, several concepts of planning can be considered.

Central planning--The career development coordinator should consult with key staff to develop a feel for approaching the process of planning and conducting career development. This will mean involving central members of the agency staff and possibly the Policy Advisory Board. The depth of preplanning to be accomplished will determine whether the Policy Advisory Board should be involved.

Pluralistic planning--When tentative plans for the career development program have been completed, pluralistic planning can begin. Here is where delegate agencies can become involved in group efforts. Tentative plans can be discussed and consensus reached in meetings involving these agencies and the CAA staff.

Collaborative planning--This type of planning is often referred to in OEO as checkpoint procedure or coordination of effort. A form for use in this type of planning is provided in the manual, Applying for a CAP Grant 9710-1. The form used is CAP form 46.

3. The planning process

The Career Development Coordinator will be the key to the launching of the plans. There are several things he should consider before approaching other staff members for assistance. He should have a general approach to planning in mind or on paper to provide for them, but must also be sure that he permits them to interact and respond to his ideas. He should be receptive to their suggestions. In addition, he should be equipped to answer their questions about career development.

The organization and responsibility for planning should be carefully thought through with proper respect for the magnitude and complexity of

the undertaking and the need for an orderly and systematic approach. These are the kinds of things to be considered in preplanning:

- Scope of planning contemplated.
- The role of the Career Development Committee.
- The Board's role.
- The staff's role and organization.
- The role of neighborhood groups.
- Liaison with other planning groups.

As used here, "scope" refers to the extensiveness of planning to be conducted.

The Board's role will be determined by how active it is in day-to-day operations of the CAP and how interested it is in career development. This will have to be a "play by ear" kind of determination, but misreading of board intentions or desire can be disastrous.

The size of the staff and the extent of its specialization will determine the roles of each member in the CDC.

Local neighborhood groups can play an important role in determining the success of the program. They can assist the agency by helping establish local guidelines, inform local residents of career opportunities, give advice on matters such as recruitment methods.

4. Liaison with other groups

In preplanning stages, thought must be given to forming liaison with other groups. It will be necessary to take a good look at what other agencies in the community are doing. In contacts with local agencies, their career plans should be discussed to obtain data that may be useful to the CAP and to determine the role they may play in career development.

Careful thought must be given to the development of cooperative relationships with key officials of other agencies who can be invited to study CAP career development plans and discuss ways the agencies can assist each other.

5. Coordination of efforts

In these planning stages, effective communication among staff and delegate agencies is important. When it is effective, the obstacles to implementing the program can be reduced and people are more likely to become effectively involved in supporting the effort.

As soon as possible, a general outline of the program should be made available to circulate to agency staff and delegate agencies. It is imperative that across-the-board representation be made on key decisions of the Career Development Committee.

Coordination of effort should be established with the local funded programs under other departments. This has been a requirement of OEO all along. The standard check point form is the CAP form 46. The guidelines state that the agency must show the work program and budget of program accounts which directly affect the activities or concerns of local or state officials, agencies or institutions to these agencies for comment.

The CAP form 77 is a standard form used by OEO to check with the State Economic Opportunity Office (SEOO). There is also a chance that the local CAA will have information about the SEOO. The state offices may be of help in advising or getting additional support services from other state funded institutions such as the local school system.

6. OEO guidelines for recruitment and selection

A. Responsibility for Recruitment and Selection of Paid Staff

1. OEO Nationally:

The Office of Economic Opportunity at the national level establishes policies, standards and guidelines governing the hiring of grantee and delegate agency staffs.

2. CAP Regional Staffs:

a. Explain and interpret national issues on recruitment and selection and authorize exceptions as warranted.

b. Monitor the activities of grantees and delegate agencies, to make sure that such policies, standards, and guidelines are understood and followed.

c. Provide help and advice in the establishment of local policies and standards.

3. Governing Boards and Advisory Committees.

Governing boards and advisory committees have a comprehensive role in planning, overseeing and evaluating the local community action program. This includes responsibility for helping to assure full observance of national OEO/CAP policies and compliance such as provisions and conditions of the grant which bear on staff selection and pay. In addition, properly structured governing boards and committees are broadly representative of the community. Membership of such boards and committees should include residents of the areas being served, parents, public officials, leaders or representatives from one or more public schools, representation from departments of education, churches, business and mercantile organizations, civic associations and groups, private public service organizations and others.

Governing boards and advisory committees should have a role in establishing selection criteria and other personnel policies. These bodies can also assist in helping to assure that the most suitable candidates are recruited. (1) They can move quickly to prevent favoritism or bias in hiring, and (2) Through their wide circle of community contacts they will have access to sources of possible candidates for jobs, and will be able to contribute information that will be of value in appraising the suitability of many candidates. (The Recruitment and Selection Section of Revised CAP Memo 23-A can be helpful.)

4. Program Directors.

The program directors, within the policies or limitations of OEO and as may be set by the local boards or committee, should be delegated responsibility for all FINAL decisions on the selection of staff members, and for managing the staff.

B. Recruiting Candidates.

Every local program director should assume responsibility for ensuring that recruitment for all staff positions is orderly and thorough. Vacant positions should be widely announced to residents of the areas being served, so that all who are interested have an opportunity to apply and be considered.

Generally, each job opening should be announced on a mimeographed sheet printed on one side, suitable for distribution and posting on bulletin boards such as in public buildings, grocery and drug stores in the area being served, and all local CAA facilities to inform their staffs of openings.

There are at least three important items of information which ought to be carried in announcements:

1. Explanation of the Program. Many individuals in every community undoubtedly will not clearly and accurately understand what CAA is all about. To help clarify the nature of the program to whomever may read the announcement, particularly those interested in applying for the position, the announcement should begin with a brief summary of the program.

2. Non-Discrimination Policy. Announcements should include a summary statement of the Agency's policy of non-discrimination.

3. Nature of the Work, Qualifications Desired, Compensation, and Opportunities. A brief job description, statement of qualifications desired, salary offered and a brief indication of training and career development opportunities should be part of the announcement.

4. Where, When and How to Apply. Announcements should include the name, address and telephone number of the center, and the date by which applications must be received to be considered. Suggest that interested individuals call for an appointment. This will help prevent an uncontrollable flood of applicant traffic in the center. It will also make it possible to do some screening by telephone, thus saving obviously unsuited individuals the time and expense of a trip to the center.

C. Applicant Files and Records.

It is important to maintain an alphabetic file of applications as a recruitment resource, and a means of establishing compliance with federal and state fair employment requirements. There should be a

notation on each application indicating the reason the individual was not hired. When the file of applications becomes large enough, it will be more convenient to organize them by types of positions for which they are suitable, and alphabetize them within these groups.

D. Selection Policies.

Grantees and delegate agencies have a considerable amount of latitude for taking action and for decision-making in respect to staff selection. At the same time, there are Office of Economic Opportunity policies and requirements which must be strictly observed, to the spirit and letter. Some of these policies and constraints are written into the Economic Opportunity Act, and others have been administratively derived and issued, such as OEO Instruction 6005-1.

1. Utilization of Assistants to Professionals. It is essential to plan the staff to provide as many development opportunities for assistants to professionals as possible, consistent with the needs of the program. All individuals who apply and appear to have potential to perform the work of program assistant positions, by virtue of their personal traits, informal experience, reputation or work in the community, must be considered.

2. Need for Employment. The best interests of all in the program should be placed ahead of the need of a specific individual for employment. The "ideal" candidate will need the job to help support a family. He should also be responsive to the needs of the professional to whom he will be assigned. These qualifications are particularly important in candidates for teaching assistants, community assistants and health assistant positions.

3. Area Residence. To realize OEO's objective of total community action, positions of assistants to professionals should be filled to the greatest possible extent by residents of the low-income area being served by the center. In those few instances where this is not feasible, it will be necessary to widen the area of consideration, for example, to take in marginal neighborhoods, or the entire community.

7. Career planning and progression

Individuals from low-income families must be given preference for all jobs which they can perform satisfactorily, with needed training and development. These will generally be the "assistant" jobs, such as teaching assistants, community assistants, health assistants, clerical assistants, and those jobs that combine some or all of these functions. When they are hired, such individuals must be provided opportunities to be trained for professional positions. They must be given career opportunities, not just job opportunities.

To provide these career opportunities, new career ladders must be developed. Continuous training, year in and year out, must be offered, aimed at enabling all interested and qualified assistants to move steadily upward. Through such programs many assistants will be enabled to assume more responsible jobs. Many will level off short of achieving professional status as a certified teacher, professional social worker, registered nurse, and so forth. However, with effective training, education and development, they will all be able to rise above the performance of unskilled tasks and simple chores, and will become qualified for more than minimum-wage jobs.

To the greatest extent possible, the development of CAP employees should be designed to increase their career opportuniites outside the agency, e.g., with educational systems, welfare departments, and so forth.

New employees hired as assistants in any local program of course vary greatly in their degree of readiness to perform work assignments. Some will be able to perform more complex and more responsible tasks right from the beginning; some will be able to absorb training and work assignments more quickly than others.

FOUR: MILESTONES FOR IMPLEMENTATION -- THE GENERAL PROCEDURAL MODEL

The functions of planning, organizing, directing, and implementation are essential to the operation of the career development program. At many stages, these functions may become quite complex because of the variety of agencies, groups, and institutions involved.

The technique described in this chapter -- PERT -- can be used to help minimize delays, interruptions, and conflicts in carrying out these functions. PERT stands for Program Evaluation and Review Technique; it was developed by the Navy Special Projects Office and is based on a "Gantt milestone chart," developed by H. L. Gantt, "the father of scientific management." The technique has been recommended for use in CAP programming and is fully described in the OEO Training Manuals 6321-1 and 6321-2, PERT for CAA Planning, A Programmed Course of Instruction in PERT.

PERT is used to visually diagram the coordination and synchronization of various parts of an overall job. Activities to be accomplished are charted on a "PERT chart" in an orderly sequence, and constant referral to this chart while a project is being conducted has the effect of expediting the completion of work at appropriate times.

> It is a method of scheduling and budgeting resources so as to accomplish a predetermined job on schedule. It is a communication facility in that it can report developments, both favorable and unfavorable, to managers, and in that it can keep the managers posted and informed. Above all, PERT is an outstanding approach to achieving completion of projects on time.[1]

[1]Levin and Kirkpatrick

In their text on PERT, Levin and Kirkpatrick add this caution, however:

> Neither PERT nor any other management technique solves managers' problems. Instead, they help a manager realize what his problems are, what solutions are realistic, and hopefully, the strengths and weaknesses of each. PERT tries to keep managers apprised of all factors and considerations that bear on their decisions. Although PERT is no substitute for managerial intelligence and perceptivity, experience and judgment, it can be a most worthwhile aid and tool in decision making.

The process of using PERT, or of "PERTing," will be used in the career development workshops held during the CAP Career Development Project. Technical assistants will assist local staff attending the meetings in devising PERT charts to use as a guide to program management during the intervals between workshops.

PERT Fundamentals

Two major concepts form the basis of PERTing: events and activities.

An event is a specific accomplishment that is to occur at a particular point in time, such as the development of a training program for entry-level trainees. It is represented on a PERT chart as a circle.

An activity is the work required to complete or achieve the event, such as obtaining curriculum for use in training. It is shown on a PERT chart by an arrow.

This figure shows two events connected by activity:

Fig. A.

Suppose the development of plans for a career development committee is the first step in planning the career development project. This step is shown in the diagram above. Event 1 would be described as committee formed; Event 2 could be described as planning started. The activities involved in forming the committee would be called "system activity 1-2" and would be referred to as "forming the committee."

Thus, the simple diagram shown above would be described as follows in PERT terminology:

	Events	Activities
Fig. B.	1 2	1-2

A plan consists of many activities and events. These are charted in PERT networks. For example:

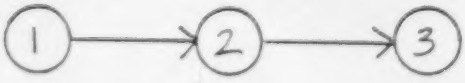
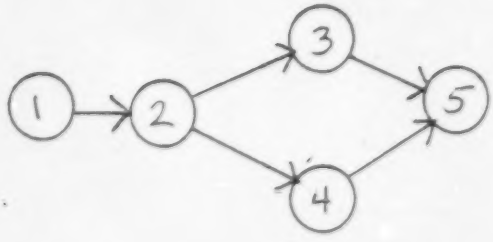
	Events	Activities
Fig. C. 	1 2 3	 1-2 2-3

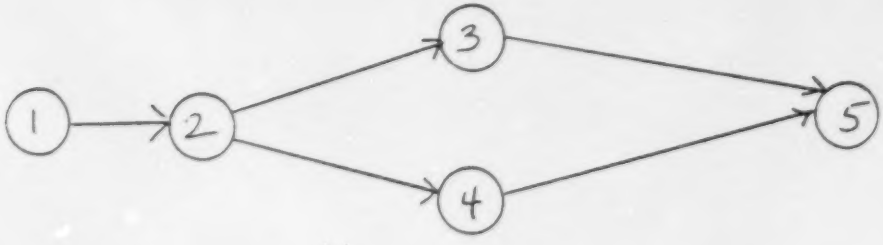
Fig. D. 	1 2 3 4 5	1-2 2-3 2-4 3-5 4-5

Some networks, such as those in Figs. B and C, are "straight line networks," in which each activity requires that the immediately preceding activity be completed before the next is started.

Many networks, however, cannot possibly be constructed in a straight line because they represent various kinds of work or activity being conducted simultaneously. Fig. D is an example of a more complex network in which Activities 3-5 and 4-5 both lead to Event 5; Event 5 can be called the "ending event" for the two activities. For example, obtaining facilities and equipment to conduct training and the development of job descriptions are both activities that lead to the end event, establishment of a career development training program.

The method of PERTing becomes useful when it is done in relation to time. The process diagrammed in D above becomes a useful tool for managing a project when it is diagrammed in relation to time.

Fig. E.



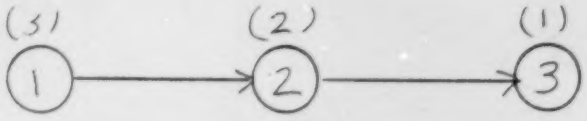
Month: 1 2 3 4 5

The diagram indicates, for example, that Event 5 is to be accomplished at the end of the fifth month; and that Activities 3-5 and 4-5

are to be conducted simultaneously beginning during the third month. Neither 3-5 nor 4-5 can be started, however, until Event 2 is completed near the end of the second month.

PERTing is best done by first listing all the events to be accomplished during the Career Development Project. The end event should be charted first when you begin to put your PERT chart on paper. For example, the end point might be an event that is described as a meeting to conduct a final evaluation of the project and to plan for future career development activities in the CAP agency. This event should be illustrated first. Then, working backward, each preceding step is drawn in, allowing the appropriate amount of time for completion of each stage. Training for entry-level aides, for example, should last from six to nine months, depending on local needs and goals. Therefore, the beginning of that activity should be charted to occur six, seven, eight, or nine months prior to the final event. Planning for that training should be completed by the time the training program begins; therefore, you would probably go back three months farther in time to put the planning activity on your chart. The numbers in parentheses above the events charted below indicate the order in which they will be drawn on the chart:

Fig. F.



Explanation: Event 3, the first to be drawn on the chart, refers to Evaluation and Future Planning.

Event 2, the second to be drawn, refers to the start of the training program.

Event 1, the last to be drawn, refers to the completion of planning.

Activity 2-3 consists of conducting the training program.

Activity 1-2 consists of planning the training program.

In workshop sessions, technical assistants and CAP representatives will assist you in developing the PERT chart required for your particular career development activities and events. You will have these charts to guide you during the intervals between workshops. They will also permit you to continually assess and evaluate your progress and to determine the need for technical assistance.

At the first session, you will draw two PERT charts -- one to serve as an overall guide for conducting the program. The second will include only those activities and events that are to occur during the first two months of operation.

At the second workshop session, you will be asked to PERT your activities and events for the next two months. How much farther you can progress in planning at the second workshop will depend on how close you came to accomplishing all your events during the preceding period. If you did not accomplish all activities, some from the first chart may have to be included on the second. Thus, the process of PERTing will help you to recognize your failures and successes, and help you to take them all into consideration in projecting activities and events for the next period.

FIVE: TOOLS FOR PLANNING, IMPLEMENTATION AND EVALUATION OF PERFORMANCE

This chapter provides you with a general procedural model (Figure G) for conducting a career development program.

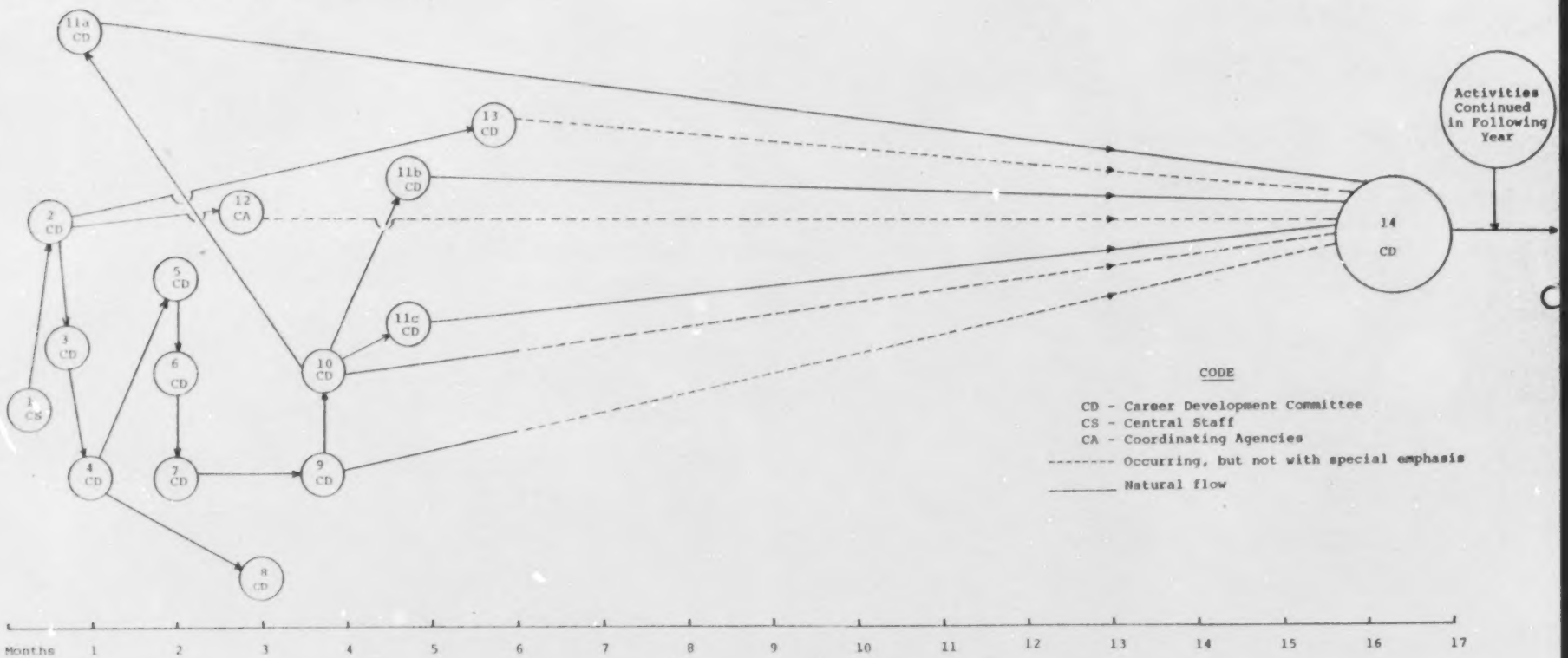
You can use this model as a pattern for PERTing your own activities and events on the blank pages provided for that purpose at the end of this workbook. Yours will resemble the general model, but is not expected to look exactly like it. For example, you may know that because of particular local problems, you will need more time for particular activities than is indicated on this chart.

Following the general procedural model, there is a legend describing the phasing of the career development activities plotted on the chart.

Figure H on page 122 shows a modified version of PERT--the linear method. This is simply another way of projecting activities and events, and the same basic approach is used in constructing such a chart. Sometimes it may be helpful to draw a linear chart and then use the information obtained in the process to do a PERT chart using circles and arrows.

The task completion forms (also provided at the end of the book) are for your use in reporting progress and the need for technical assistance. They are to be submitted to the National Institute for New Careers every two weeks. Remember, they are for information only--nothing else. Receiving them regularly will help us provide you the assistance you need.

Fig. 6 General Procedural Model (PERT) — Version I



Legend explaining General Procedural Model (PERT)

Event 1: Start.

Activity 1-2: Preplanning. Central staff of the CAA begins making plans for the formation of the career development program; begins informing staff and related agencies of the program.

Event 2: Preplanning completed.

Activity 2-3: Establishing the career development committee; holding meeting to inform staff about the committee, select members, and elect or appoint the career development coordinator.

Activity 2-12: Maintaining linkage with supporting institutions, such as an educational institution which will provide part of the training or with a local health agency which may supply a trainer to assist in the CAA training effort.

Activity 2-13: Handling budget and finance matters, including seeking sources for funding to support the program.

Event 3: Career development committee established.

Activity 3-4: Analysis of data on hand; career development committee becomes familiar with process of career development and identifies resources--people, facilities, funds, etc.--available for conducting the program.

Event 4: Data analysis completed.

Activity 4-5: Planning career development program. Committee members determine goals of the program and begin to establish the methods by which the program will be conducted.

Activity 4-8: Locating physical facilities for the training activities; making arrangements for their availability and use.

Event 5: Career development program plans completed.

Activity 5-6: Analyzing total job to be done by CAP agency. This involves identifying and perhaps restructuring the goals, purposes, and objectives of the agency in order to form a basis for understanding how the tasks of the agency--professional and nonprofessional--should be conducted and who should be responsible for each. The functional job analysis to be done in Activity 6-7, a vital part of the career development program, cannot take place unless all the tasks to be performed by the staff have been identified.

Event 6: Total job analysis completed.

Activity 6-7: Performing functional job analysis. This consists of assigning the tasks identified in Activity 5-6 at appropriate levels of the staffing hierarchy. (See Figure I, page 56.) For example, tasks that require the same level of understanding and experience and training

will be grouped together into task clusters. These clusters will form the basis for job definition and the establishment of career ladders.

Event 7: Functional job analysis completed.

Activity 7-8: Defining jobs and establishing career ladders. This consists of logically arranging related tasks into job descriptions, taking into consideration the amount and kinds of training, education and experience required to perform each job. The jobs so defined are then related to each other in a logical succession of career advancement--the result obtained is a career ladder.

Event 8: Physical facilities obtained. (The activity of obtaining physical facilities has been conducted all the while simultaneously with Activities 4-5, 5-6, and 6-7.)

Activity 7-9: Designing the training, educational and supportive services program. This consists of determining how job training will be conducted, by whom, and when. Curriculum should be obtained for use in the training to be conducted within the agency. Arrangements should be made with other agencies or educational institutions that will provide part of the training and curriculums should be located for use in these programs.

Plans should be made for the provision of supportive services such as health care or job related counseling. Note: Three kinds of training will be planned--training for supervisory staff to enable them to provide in-service and on-the-job training; 2) training for the upgrading of persons already employed by the agency, and 3) entry-level training for new employees from among the disadvantaged.

Event 9: Training programs planned.

Activity 9-10: Recruiting and selecting entry-level trainees for training. Identifying persons already employed for inservice training or released time for educational purposes.

Event 10: Training programs started.

Activity 10-11a: Conducting staff training. (Note: This training actually started when you attended the first workshop, and occurs in the continuing inservice training provided for your staff. Some of this training is for the specific purpose of preparing staff to conduct entry-level or upgrading training.)

Activity 10-11b: Conducting upgrading training.

Activity 10-11c: Conducting entry-level training.

Event 12: Plans for linkage completed. (The dotted line indicates that linkage will continue throughout the life of the

program and that new linkages may be formed as time passes.)

Event 13: Budgeting and financing arrangement completed. (Dotted line indicates that continuing efforts will be made to locate and utilize additional sources of funding.)

Activity 11a-14: Staff training continues and evaluation is begun.

Activity 13-14: Continuing efforts to locate new funding.

Activity 11b-14: Upgrading training continues and evaluation is begun.

Activity 11c-14: Entry-level training continues and evaluation is begun.

Activity 10-14: Efforts to recruit and select persons for future upgrading and entry-level or staff training continue.

Activity 9-14: Effort to develop and design new training methods and curriculum continue.

Event 14: Training completed and meetings held to evaluate career development program and make plans for future career development activities.

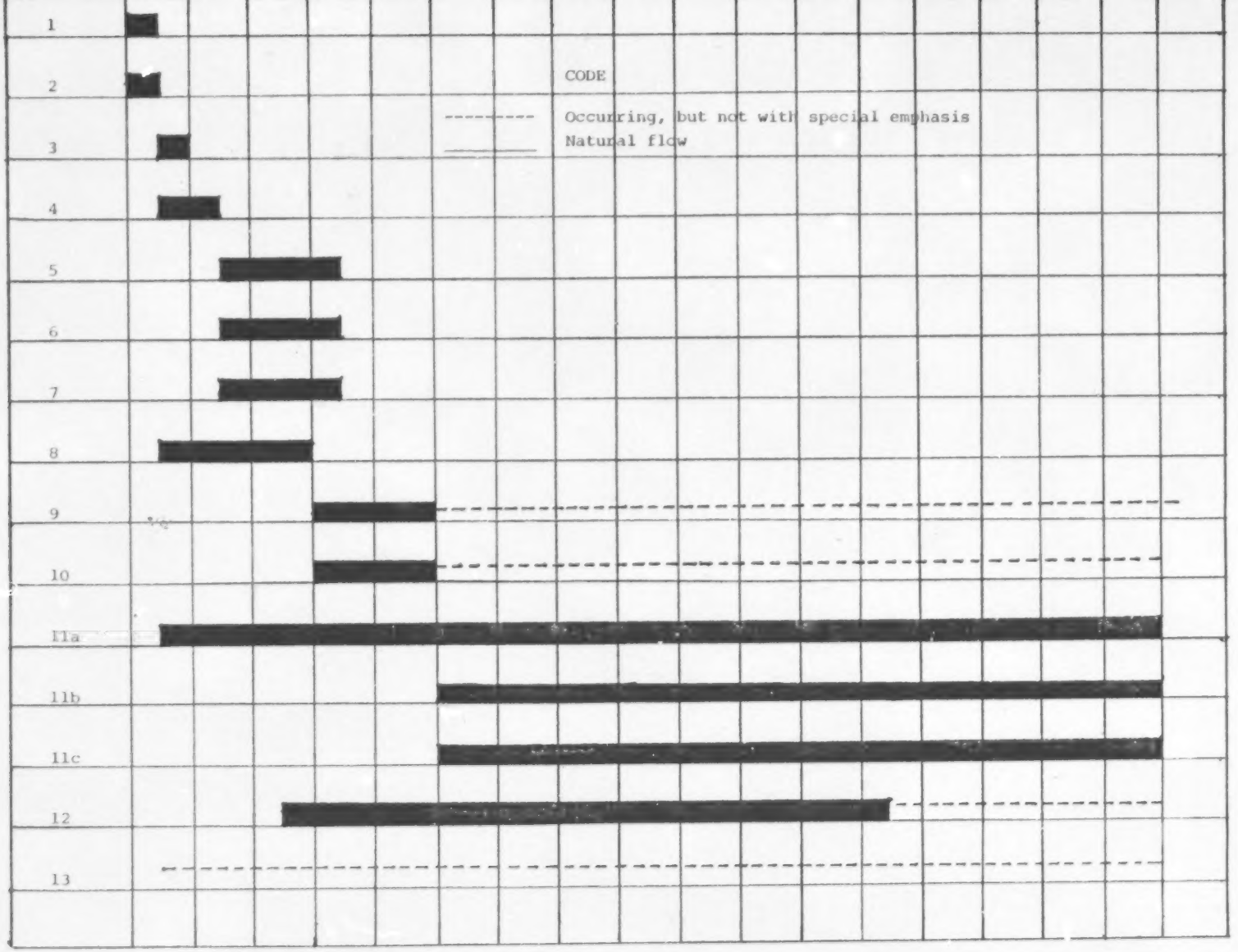
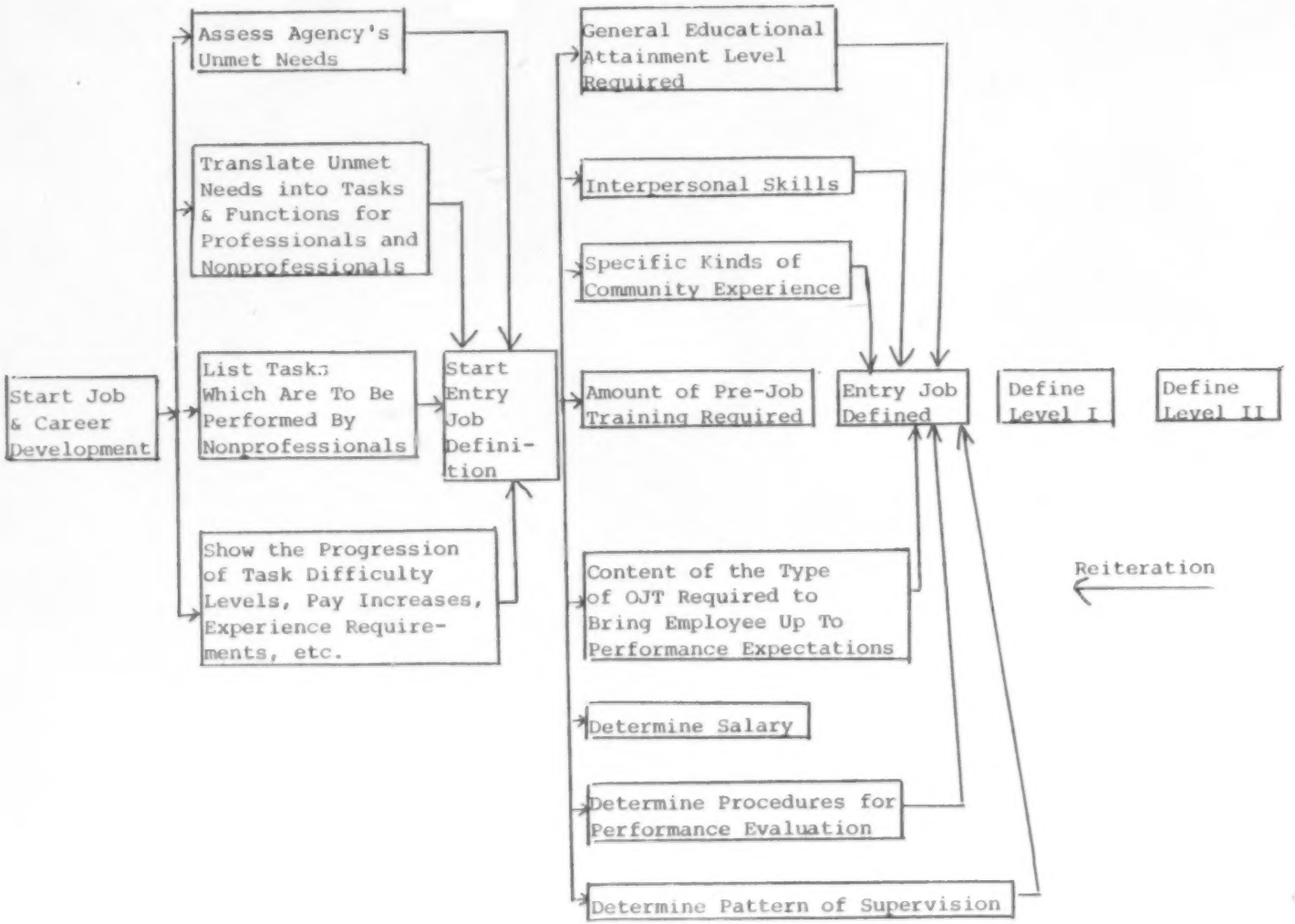

1
2
3
4
5
6
7
8
9
10
11a
11b
11c
12
13
CODE
Occurring, but not with special emphasis
Natural flow

Fig. I: Steps in Functional Job Analysis


Assess Agency's Unmet Needs
Translate Unmet Needs into Tasks & Functions for Professionals and Nonprofessionals
List Tasks Which Are To Be Performed By Nonprofessionals
Show the Progression of Task Difficulty Levels, Pay Increases, Experience Requirements, etc.
Start Job & Career Development
Start Entry Job Definition
General Educational Attainment Level Required
Interpersonal Skills
Specific Kinds of Community Experience
Amount of Pre-Job Training Required
Content of the Type of OJT Required to Bring Employee Up To Performance Expectations
Determine Salary
Determine Procedures for Performance Evaluation
Determine Pattern of Supervision
Entry Job Defined
Define Level I
Define Level II
Reiteration

RESOURCE MATERIALS

Resource Materials

A. CAREER DEVELOPMENT FOR PROGRAM ASSISTANTS

Career development for program assistants usually has four components:

1. Establishment of a series of proficiency or developmental levels in each field of job specialization reflecting increased capability to perform assignments and tasks more effectively or to perform more difficult and responsible tasks.
2. Preparation of a program to provide institutional and on-the-job training and structured learning experiences. Training should include a program of continuous work toward a high school equivalency certificate for those who need it.
3. Development of a testing program and standards to help determine with a satisfactory degree of objectivity whether trainees have acquired and can effectively use the knowledge and skills in which they have been given training.
4. Design of a pay advancement plan which will provide reasonable salary increases and advances in classifications and job titles in recognition of successful completion of training and improved job performance.

Establishment of Developmental Levels--the Career Ladder

Each program assistant should be encouraged to select a "target job" toward which he desires to aim his training. This may, for example, be a position as a certified teacher, professional social worker, registered nurse, dental technician, secretary or community development

director. The target job may or may not require a college degree, depending on state laws. The individual may already have a college degree, but not in the desired field. In many cases the employee will not even have graduated from high school. Nevertheless, each employee should be started on a plan that will take him toward his goal, whether it can be reached in a year, 10 years, or more. Many will never reach their goal. But, selecting a target job and working toward it will enable many to reach their goal or to benefit from whatever forward and upward progress they make. The process of designing a career ladder therefore begins with the identification in detail of all the duties and tasks to which in-service and "on-the-job" training and development should be directed. If professional staff members are asked to write down all the functions, services and tasks they perform, it will be relatively easy to identify those which a properly trained assistant can be expected to perform and receive training in.

Advancement Related to Increased Proficiency

An important concept that must be borne in mind in planning for the career development of program assistants up to the threshold of professional assignments is that it may not be possible or desirable to create a series of distinctly different jobs through which the individual will ascend. The progression of steps set up should not be structured rigidly, in terms of duties and tasks to be performed at each level. It would be unrealistic to expect that every employee at the trainee level will perform all the same duties. The principal differences in kinds of work performed by employees on different rungs of the career ladder will be related to the degree of proficiency, skill and understanding they have acquired as a result of their training and experience.

Thus, there will be similarities among the duties of employees classified at trainee, intermediate and advanced levels. For example, all social services aides, at every level of development, may make home visits. However, the trainee, in making home visits, may be learning and performing only such fundamentals as how to establish a relationship of trust and confidence and how to identify problems. At the intermediate level, after training and experience, the assistant making home visits will probably be able to impart useful information and to help solve minor problems. With further training, development, and experience as an advanced aide, the individual may be qualified to perform the full range of the program assistant's role. Career advancement will be more related to how well and how extensively the employee is capable of performing assigned functions than to any basic differences in duties or job description content.

Advancement, represented by changes in title and salary are incentives which strengthen the motivations of employees to study and work hard to increase their knowledge and develop their proficiencies. It is recommended that advancement be scheduled in frequent relatively small steps.

Relating Tasks to Career Ladders

Providing for Generalists and Specialists--In the CAA, numbers of career ladders for program assistants depends on the size of the program. In small programs, assistants will need to serve more as generalists, each performing assistance in teaching, health, social work or administration. In a very large center, or complex of centers, the staff will specialize more. In either case, provision should be made for lateral mobility, enabling individuals to cross over from one specialization to another. Such

a policy will provide the broadest possible developmental opportunities for all and enhance each individual's chances to obtain more responsible better-paying jobs.

A Specific Career Ladder for Each Assistant--In order to design career ladders appropriate to the program and the individual, every program assistant should be evaluated in terms of his basic developmental needs and should participate in planning his own career steps. Each plan should be clearly and specifically defined over at least 18 months to two years even though reaching the target job may take many years. This involves planning a series of training goals and performance objectives by which the individual will receive systematic continuous development. It is very important to recognize that the steps in a career development ladder need not represent a series of different jobs.

Sample Career Progression Plans

The following examples of career progression steps should not be considered as rigid formulas, in terms of sequences of content. They only illustrate how a series of upward steps may be planned for the development and advancement of assistants.

The combinations are suggested as possible groupings of tasks and subjects to be learned at:

1. The entry or trainee level, to qualify for advancement to an intermediate level.
2. The intermediate level, for promotion to a senior or advanced level.
3. The advanced level, for promotion to a "professional career threshold," which would identify the assistant as ready for

professional level training, with financial help, if necessary and available.

Assuming that assistants would be expected to acquire the knowledge to perform satisfactorily all listed tasks for each career step or level within a period of perhaps 6 to 12 months, it would take about 18 months, in an exceptional case, to 3 years or more to reach the top of the ladder.

To determine whether an assistant has learned and "can do" each specified task or subject, it is recommended that simple knowledge tests be used, and also that assistants be required to perform each task satisfactorily a specified number of times in order to be considered qualified in that phase of the work. They will, in effect, be "checked-off" for that task. Consideration might be given to the presentation of a certificate to the employee at the time he masters each career level. When the assistant has mastered all the trainee level tasks prescribed, he should be advanced promptly to the intermediate level position, with a change in title and an appropriate salary increase. The titles and salary increase are suggested ones. Centers should set up their own plans within approved OEO salary increase policies.

TRAINEE LEVEL

The following combinations of tasks, and subject matter in which academic training can be provided are examples at the entry or trainee level. Similar combinations can be set up for office or administrative work, or any new function that may emerge.

TITLE: Teaching Assistant Trainee PAY RATE: At least minimum wage.
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO INTERMEDIATE LEVEL:

1. CAP objectives and concepts.
2. Purpose and organization of the center.
3. Program components and team work.
4. Establishing relationships of trust.
5. Talking with an individual and building his confidence and responsiveness.
6. Playing games with children.
7. Telling stories to children.
8. Reading to children and encouraging children to use books and records.
9. Playing musical instruments for the children.
10. Participating in rhythm activities with the children.
11. Observing and writing down the activities and behavior of a child or group of children.
12. Helping children use crayons, scissors and paste.
13. Helping children enjoy sensory materials such as sand, mud, and water.
14. Preventing accidents in the classroom and outdoors.
15. Recognizing and reporting signs of illness or health problems.
16. Assisting in serving meals and snacks.
17. Assisting in developing good habits of personal hygiene.
18. Cleaning classroom and other play areas.
19. Bringing out and putting materials away.
20. Caring for pets and plants.

TITLE: Community Assistant Trainee PAY RATE: At least minimum wage.
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO INTERMEDIATE LEVEL:

1. CAP objectives and concepts.
2. Purpose and organization of the center.
3. Program components and team work.
4. Recruiting.
5. Establishing relationships of trust.
6. Making house-to-house surveys.
7. Visiting needy families and urging them to come to the center to meet with professional staff members.
8. Encouraging and assisting families to find medical aid when conditions of illness are found.
9. Helping families fill out applications and other forms for community social services, legal aid, or any other assistance.
10. Obtaining volunteer sitters or minding children while a parent goes for medical or dental care or takes other children for treatment.
11. Helping families develop self-help and fix-up plans to improve their living conditions.
12. Obtaining emergency food and clothing for families in desperate circumstances.
13. Obtaining donations of used furniture, refrigerators, stoves, and so forth, and arranging for volunteer neighbors, parents, teenagers, and others to deliver and install needed items of this nature.
14. Helping families to be sure that young children get started to school at the proper age, which might otherwise be delayed by lack of adequate clothing, shoes, and so forth.
15. Promoting interest and participation and involving the families with the center; arranging transportation for them when necessary.
16. Participating in meetings with professionals, parents and other community groups, and preparing reports of the meetings.

TITLE: Health Assistant Trainee PAY RATE: At least minimum wage.
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO INTERMEDIATE LEVEL:

1. CAP objectives and concepts.
2. Purpose and organization of the center.
3. Components and team work.
4. Establishing relationships of trust with children and their families.
5. Confidential nature of medical information.
6. Bringing children to and from classroom and physician, dentist or nurse for examination or treatment.
7. Picking up and delivering children and parents for examination or treatments as may be necessary.
8. Obtaining and furnishing records to physician, dentist or nurse as needed.
9. Observing children for coughs, signs of fever, runny nose, scalp or skin conditions, and so forth, and reporting such matters to physician or nurse.
10. Observing signs of illness in the home, and assisting family to get any help needed.
11. Assisting families to correct unsanitary conditions or health hazards in their homes or environment.
12. Seeing that children take medicines prescribed for them while they are at the center.
13. Weighing and measuring children.
14. Visiting hospitalized or bedridden members of families to learn of needs and supply comfort, encouragement and assistance.
15. Obtaining crutches, wheel chairs and other devices when needed and getting them to the patients.

INTERMEDIATE POSITIONS

There should be one or more intermediate level career steps, depending on the desired pace and estimated length of the career development program. While each assistant should be able to proceed up the career ladder as fast as he reasonably can, each step should represent a significant amount of experience and seasoning as well as training. Thus, progression from trainee to the first intermediate level position might be planned to take four to eight months on the average. The second block of training and development might take another six months. On this basis, at the end of perhaps 12 to 18 months, the employee would have completed two blocks of training and experience--trainee and intermediate--and would be ready to move up to the advanced level.

Tasks set up to be learned to qualify for promotion to intermediate positions might be as follows:

TITLE: Community Assistant PAY RATE: (Small Salary Increase)
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR PROMOTION TO THE ADVANCED LEVEL:

1. Introduction to Sociology.*
2. Introduction to Psychology.*
3. Introduction to the family as a social structure.*
4. Assisting the coordinator in the organization of groups. Making arrangements for meetings.
5. Surveying or studying social services available in the community and learning their procedures and policies.
6. Doing library research on social service questions or programs.
7. Cataloging and filing data and reports and source materials and reference materials.
8. Answering the telephone, giving routine information and taking messages.
9. Attending meetings with professionals to take notes and assist as appropriate.
10. Assisting families to analyze their problems and catalog their needs, and helping to establish eligibility for assistance.
11. Providing information to families on community services available, welfare rights, where and how to apply, who to see, and so forth; accompanying family members to social service or other agencies for advice or assistance.

*Suggested academic courses.

TITLE: Health Assistant PAY RATE: (Small Salary Increase)
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR PROMOTION TO THE ADVANCED LEVEL:

1. Growth Patterns in the Preschool Years.*
2. Growth Patterns in the School Years.*
3. Introduction to nutrition.*
4. Maintaining appointment calendar and reminding patients of appointments, following up on broken appointments.
5. Assisting families to complete applications for medical and other health services.
6. Helping parents set up home records of children's immunication shots, ailments and injuries, times and places of treatment, and so forth.
7. Helping prepare patients for x-ray or other diagnostic procedures.
8. Collecting specimens, taking them to laboratory and obtaining reports for doctor or nurse.
9. Taking temperatures, pulse and respiration counts.
10. Preparing children and assisting with children receiving immunization shots.
11. Taking children for medical and dental treatments when parents cannot do so.
12. Bringing to attention of doctor, nurse or nutritionist, those home conditions which point up lack of adequate food or dietary habits which may be injurious to children or family.
13. Observing for signs of mental health problems and urging families to seek assistance on problems involving alcoholism or drug addiction.
14. Assisting with prenatal and postnatal care.

*Suggested academic courses.

TITLE: Teaching Assistant PAY RATE: (Small Salary Increase)
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR PROMOTION TO THE ADVANCED LEVEL:

1. Growth Patterns in the Preschool Years.*
2. Growth Patterns in the School Years.*
3. Encouraging interest in words and symbols.
4. Helping children to make books.
5. Accompanying children and parents to the library.
6. Understanding and directing the developmental use of blocks and other stacking and arranging materials.
7. Teaching arts and crafts.
8. Teaching songs.
9. Teaching musical games.
10. Taking full responsibility for a group of children during outdoor play.
11. Taking full responsibility for a group of children in classroom free play.
12. Helping to plan and making arrangements for trips and outings.
13. Driving car, delivering and picking up children, parents, etc.
14. Visiting families in their homes and reporting observations orally and in writing.
15. Assisting in preparing meals and snacks.
16. Guiding children in developing manners and good eating habits.
17. Helping parents learn.
18. Posting attendance records.
19. Administering first aid.
20. Inventorying and ordering supplies and materials.

*Suggested academic courses.

ADVANCED OR SENIOR LEVEL POSITIONS

All assistants to professionals will not progress as far as the advanced or senior level. Progression to the top rungs of such career ladders involves a process of screening through in which those who have the strongest interest and best potential for eventually reaching professional levels are able to advance.

It is suggested that positions at the top or advanced level incorporate the word, senior, in the title. This helps to indicate that a more responsible level has been reached. For example, an advanced level position would be Senior Assistant. Upon successful completion of this stage of their development, those involved could then move up to the top level, having arrived at the threshold of professional training.

TITLE: Senior Teaching Assistant PAY RATE: (Small Salary Increase)
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO THE PROFESSIONAL THRESHOLD LEVEL:

1. Introduction to Preschool Education.*
2. Introduction to Child Psychology.*
3. Assisting with enrollment of children.
4. Helping to plan daily programs and new activities.
5. Assisting in planning attractive and nutritious meals and snacks.
6. Taking responsibility for a group of children while on a trip or outing.
7. Assisting the teacher in analyzing and solving problems of withdrawal, aggression, and the like.
8. Attending meetings with professionals.
9. Participating in discussions of children's needs and progress with teacher and parents.
10. Assisting in the training of new teacher assistants.

*Suggested academic courses.

TITLE: Senior Community Assistant PAY RATE: (Small Salary Increase)
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO PROFESSIONAL THRESHOLD LEVEL:

1. Introduction to Social Service.*

2. Introduction to Social Legislation.*

3. Obtaining demographic data from institutional sources.

4. Serving as parent coordinator with responsibility for organizing and relating to parent groups. Assisting such groups to establish parent education activities. Serving as liaison between the parent group and the staff, interpreting the needs of each to the other.

5. Obtaining information and cooperation from business organizations.

6. Studying the total problems of a family and preparing a report and set of recommendations about them.

7. Going to court with parents and/or children to provide personal support and encouragement and seeing that they are represented and get needed advice and assistance.

8. Helping families seek home improvements through their landlords; when necessary, helping them get assistance in filing formal complaints against landlords who are willfully neglecting conditions that are in violation of housing and health codes; helping obtain legal assistance in such circumstances or when families are threatened with eviction.

9. Assisting families to plan a budget to obtain relief from oppressive indebtedness, to enroll in consumer education courses and to join buying clubs, credit unions, cooperatives and other activities to assist low-income families with their financial management problems.

10. Seeking and obtaining legal advice and assistance for families against whom action is being taken for repossession, wage garnishments and so forth.

11. Discussing problems with youngsters who have dropped out of school or run away from home, helping find ways to get needed advice and assistance for them.

12. Accompanying parents to school to meet school administrators, counselors, teachers and others to discuss reports on children; to seek special help for failing students, cooperation in giving extra attention to dropouts willing to re-enroll, cooperation in obtaining transfers, and so forth.

13. Organizing parent-school committees to visit schools to obrain information on comparative curricula or comparative texts being used and to seek equalization of educational standards where needed.

14. Assisting in the training of new social service assistants.

*Suggested academic courses.

TITLE: Senior Medical Assistant PAY RATE: (Small Salary Increase)
SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO PROFESSIONAL THRESHOLD LEVEL:

1. Introduction to Public Health.*
2. Introduction to Mental Health.*
3. Introduction to Psychology.*
4. Performing medical library work.
5. Interviewing parents to obtain information on immunizations, illnesses and treatment of children to set up medical history cards.
6. Assisting with hearing and vision tests.
7. Assisting in laboratory procedures such as blood, urine and other tests.
8. Ordering and maintaining stocks of medical and related supplied and equipment as required by physician, dentist or nurse.
9. Making house-to-house surveys to help uncover unknown and untreated illnesses and health problems.
10. Helping parents to put in writing complaints about discourteous health treatment or refusal of treatment to which they are entitled.
11. Visiting health and dental agencies with parents who need assistance in expressing their problems.
12. Helping families to file formal complaints of landlord neglect which has resulted in unhealthful conditions or conditions which are in violation of building and health codes.
13. Participating in meetings with parents and other groups in regard to health services and helping obtain answers to questions, advice and assistance as may be appropriate.
14. Assisting in the training of new health assistants.

*Suggested academic studies.

PROFESSIONAL THRESHOLD LEVEL

This level should be reserved for those assistants who have demonstrated unusual excellence in the performance of their responsibilities at the senior assistant level. It is not intended merely to recognize length of service. Assistants to professionals who reach this level might be advanced in title and compensation as follows:

TITLE: Career Assistant Teacher
Career Community Assistant
Career Health Assistant

PAY RATE: (Small Salary Increase)

SUBJECT MATTER AND TASKS TO BE LEARNED TO QUALIFY FOR ADVANCEMENT TO PROFESSIONAL THRESHOLD LEVEL:

Individuals who have reached the top of their assistant career ladder should, of course, continue to get additional training and development as may be appropriate. They should also be used as much as possible to train and assist in training other program assistants farther down the ladder. More important, however, is the fact that these individuals will have survived a careful screening process over a period of two or more years, and will often be prime material for professional development.

When individuals reach these levels, every effort should be made to interest them in an intensive program of academic, professional training to assist them in obtaining financial aid, such as through scholarships, subsidies, or loans to enable them to enroll in and complete professional training. Through such help, some may be able to become practical nurses, others registered nurses, professional social workers, certified teachers, secretaries, or otherwise to advance themselves.

Salary Advancements

Although grantees and delegate agencies do not have unlimited latitude in establishing salary increase policies, small salary advances may be funded and should be used to recognize the program assistants' increase in responsibilities and proficiency. Such salary plans should be designed to suit local conditions and needs. Funding requests should be handled through the usual procedures.

Thought and planning must be given to detailing all such costs at the time grant applications are being developed. If a sound career progression plan is submitted as part of a grant application, with a modest overall salary structure, it is likely that the regional CAP offices will consider favorably the small salary increments written into the progression plan. Such increases should clearly be promotions for proven ability to perform at a higher level, and to do a more complete and more extensive job at each new level. They do not serve the same purpose as periodic or step increases for continued performance at the same level of responsibility. (See CA Memo 23-A for OEO policy on salary increases.)

However, salary increases provided to support a Career Development Program should be guaranteed to the assistant upon successful completion of specified training and the passing of any predetermined tests. If the individual cannot absorb the training or does not meet the performance criteria, of course he should not be awarded the salary increase, but should get extra help to enable him to qualify.

In addition to tying salary increases into the training and development process, the awarding of certificates is a desirable form of motivation. Such certificates should be given with sufficient ceremonial recognition, such as presentation at formal meetings with staff, parents, children and

others present. Documentation of the employee's progress is also important for the purpose of increasing the employee's chances for outside employment.

Advancement Criteria

Importance of Testing Progress Being Made--Simple but adequate tests should be prepared on each unit of training set up as part of the development of program assistants. For the assistant who is weak in reading, comprehension tests should be administered orally until reading skill is sufficiently improved.

Tests tend to strengthen motivation. Most people will study and work harder if they know their learning is to be tested. These tests may be self-administered and self-scored if desirable. The scored tests, of course, provide feedback for the professional and the learner on what is being learned and what is being missed or misunderstood. This points up the importance of holding detailed discussions of test results with each assistant, and the importance of requiring restudy and, if necessary, some tutoring, before a retake of the examination.

Resource Materials

B. THE TRAINING COMPONENT

It is recommended that every local program operate a continuous, intensive inservice training program for the benefit of all staff members. It is highly desirable that professionals and program assistants participate together in training which will benefit both and which will foster and strengthen the team concept.

The purpose of this Section is to offer some suggestions on planning and operating an interesting, useful and effective inservice training program. While many of the suggestions offered apply particularly to the training of program assistants, others are pertinent to the further development of professionals who need inservice training.

In general, two kinds of training should be provided at the agency:

1. Training in job-related skills. This type of training should be planned by the local Career Development Committee in response to needs developed by assistants and supervisory personnel and with the assistance of the Regional Training Officers, as required.
2. Training which will provide certain staff members with the opportunity to increase basic education skills necessary to make effective use of advanced training. An important objective of every local program should be to assist all employees who have a limited education to obtain a high school equivalency certificate.

Training sessions will need to be designed to provide the training needed by CAA staff if they are to advance to jobs at higher rungs of the career ladder. Content and methods will vary, and should be designed to meet the career progression needs of trainees. Traditional methods of inservice training may have to be cast aside. Specialized training programs,

outside the "programmatic" sphere, can also be designed to meet the needs of persons preparing to assume responsibility for supervision and training in neighborhood centers. These programs can introduce and develop concepts of group supervision by engaging the participants in group learning experiences and assisting them to develop the kinds of inservice training for other staff which fosters the self-development of the adult in all components of the CAA.

The group learning experiences should be designed to serve the following purposes:

1. To train supervisors and potential supervisors in the use of the small group as a vehicle for learning, and for career and personal development for all staff members; to help trainees understand the leader's role; to develop some introductory skills in the leadership of groups.
2. To engage supervisors, and those training to be supervisors, in a process of self-exploration; to clarify basic concepts and understandings with respect to racial problems, working with low-income families, recruiting, how adults learn and the means of developing human potential.
3. To assist trainees in dealing with typical supervisory problems.
4. To assist participants to develop inservice training and supervisory programs for adults working in all components; to provide follow-up opportunities for continuous self-evaluation of such inservice and supervisory programs throughout the year.

Supplementary Training may also be provided if funds are available. This term refers to a sequence of credit courses at an institution of higher

education, generally over a two-year period. The main purposes of supplementary training are to:

1. Provide advanced training to selected persons who have demonstrated potential to assume leadership and training responsibilities.
2. Provide academic training for persons who have had little formal education and who are handicapped in the performance of their duties or are unable to make progress because of the lack of training.
3. Provide an incentive which will encourage staff on their own initiative to undertake a continuing program of academic work beyond that which may be supported by OEO.

Various adult education courses may be available at local high schools in the community in such subjects as reading, remedial reading, basic arithmetic, English composition, or business math, which will be of great value to educationally disadvantaged employees. In some cases it will be possible to arrange supplementary training courses leading to a high school equivalency certificate. It is recommended that grantee and delegate agencies establish a working relationship with local institutions which offer course work in fields related to the program.

Physical Facilities and Equipment

An effective inservice training program needs some space, facilities and equipment of its own. It is suggested that whenever possible, one or more rooms be set aside for inservice training, desirably including a "laboratory" arrangement, with a small library of appropriate materials, such as books and films. Small programs may be able to join forces with other nearby CAAs in establishing a lab training facility. Many public

schools will have space which can be made available for staff development, and some will have instructional equipment and aids which can readily be utilized in the lab-workshop program.

This type of facility will help ensure that the training program will be able to use learning-by-doing and "workshop" methods as well as lectures and discussions.

In smaller programs, or where an employee is hired as a replacement, workshop instruction can often be on a one-to-one basis, one instructor to one learner. Or, after some initial instruction, employees may profitably spend time in the workshop practicing skills by themselves.

Audiovisuals and Other Instructional Aids

One of the most versatile and universal visual aids is the overhead transparency projector. Most public schools will already have good motion picture and sound-slide projectors and screens available. Cheap projectors are seldom satisfactory and the better ones are quite expensive. For infrequent needs, grantees might borrow such equipment from a local school or a large nearby company which has a modern training program. In some locations, projection equipment can be rented from camera stores.

As with the use of any audiovisual teaching aids, use of motion-picture or slide presentation equipment should be preceded by careful preparation. Before the group assembles, the film and projector should be pre-checked for defects, spare bulb, and any extension cords that may be needed. The projector should be properly placed, plugged in and focused ahead of time, and the viewing room should be freed of distractions. The participants should be told what to expect, and what to look and listen for. The instructor should conduct an evaluation discussion with the participants

immediately after viewing the film, getting the trainees to express their reactions and viewpoints while the presentation is still fresh in everyone's mind.

Tape recorders can be widely used in staff training. Good recorders for classroom needs can be purchased relatively inexpensively. The recorder should be placed and plugged, tapes carefully organized with the first one on the machine, and measures should be taken to ensure that listening will not be interrupted or distracted by noises in or outside the classroom.

"Participative" training, in which the learner is kept active--responding discussing, demonstrating and so forth--is almost always more interesting and effective than training in which the learner plays a passive role.

Role-playing activities, or "simulation exercises" are particularly recommended in the training of program assistants.

In addition to the many assistant-child relationships that can be learned and practiced by classroom assistants using the role-playing method, health assistants can role-play the skills they will need in providing information, gathering health histories, and working with children and parents. Social service assistants can build techniques and confidence in dealing with parents, merchants, rental agents and welfare agencies through role-playing exercises.

In a tutoring situation the instructor can take one role and the learner the other, and then they can try the same exercise, exchanging roles. However, in general, most trainers seem to find it best to work with at least two learners, so that they can practice new skills by role-playing with each other.

Except for advanced students, it is usually very helpful if the instructor "constructs" the exercises to some extent, and gives the role-players some preparation.

The instructor should take care to guide the instructional process from beginning to end without over-controlling or inhibiting the creativity of the learners. As the assistants act out their roles, the instructor will usually interrupt or interject comments only if one or both of the assistants get out of character. After each role-playing exercise is completed, most instructors find it advantageous to lead a discussion or critique, while the performance is still fresh in the minds of the participants and any observers and then summarize observations about the performance of each participant. If the performance was incorrect or inadequate, assistants will benefit from being given additional chances to perform until they get it right and build confidence in themselves.

It is recommended that frequent discussion or seminar sessions, devoted to specific problems or questions be part of every training program. Not only the program assistants, but volunteers and interested parents will enjoy and profit from these seminars. When guided by a competent and well-informed person, group discussions will generate creative expression, help develop desirable social skills, and increase the participants' ability to cooperate in group decision-making.

In presenting a problem or issue to be discussed, the discussion leader will find it helpful first to state the facts or conditions of the problem and put them in summary form on a blackboard or easel pad. Over-complicated subjects can be divided into more understandable segments. However, an overly complicated problem tends to result in a confused, complicated discussion and it may be best to stick to simply-stated issues or questions in the beginning.

At the beginning of a conference, an informal atmosphere must be established. It is wise to observe the following rules: Set a fifteen-minute or a half-hour time limit for the entire session. At first, invite individuals to speak by turns. As soon as the discussion gets going, allow it to "free-wheel," as one person gets an idea and then another chimes in. Participants should state their suggestion within a short time limit, such as 60 seconds. Although one participant can add to what another has said, no participant should criticize in any way another's contribution.

Training for Classroom Assistants

When an assistant has completed orientation training ,has become acclimated to the center, and has begun to master his initial assignments, he should be started on an intensive program of training and development. Time of hiring, previous experience, and the work-load of the center will all effect the sequence and nature of the training provided.

Forms, Records and Reports--In the field of social services, few important things get "completed action" until a request or approval is reduced to writing, put in proper form with required number of copies, and is sent through the right channels. Many delays and difficulties arise when one is unable to get the necessary papers fully and correctly executed and into the right hands.

Filling out the kinds of documents needed for today's living can present very serious obstacles to thousands of impoverished, undereducated families. Assistants need to be given careful instruction in helping families overcome these obstacles. First, it will probably be necessary

to improve the basic reading, writing and arithmetic skills of the assistants. Secondly, a highly organized program of training will be required to instruct them in the specific requirements of each form as well as the benefits and procedures connected with it.

It is suggested that the professional staff obtain and organize sets of such forms and printed procedures, and write out supplemental instructions as needed, on every application form or report which low-income residents may need to use.

Training sessions for the assistants can then cover each of the programs to which the forms relate, how to complete the forms, and where and to whom to submit them. By having transparencies of the forms made for use in an overhead projector, the professional, serving as an instructor, can use a sharp black crayon pencil to fill in each item on a form as the item is discussed, with the entries on the transparency form then appearing on the screen as they are written. Assistants should have adequate practice opportunities to fill out each form themselves, using hypothetical families for trial purposes. The completed practice form should be reviewed in detail, by a knowledgeable professional, with the assistant who completed it.

Interviewing--The assistant will on numerous occasions need to obtain information from individuals and provide information to others. To give and get information will involve interviewing in the sense of person-to-person conversation with specific objectives in mind. Such interviews will sometimes occur in the company of a professional. However, if the assistant is to be fully helpful, he should be trained to give or obtain many kinds of information and to do this in a courteous, considerate,

systematic, and thorough manner. It is recommended that interview training be given early prior to implementing the overall training schedule.

Initially, interviewing can be as simple as conversing with another person, exchanging a little information, which assistants will be able to do readily. From this point, the objectives of practice interviewing assignments can be increased in scope and complexity as the assistants' skills gradually increase. Demonstration by professionals and role-playing among professionals and assistants are usually the basic methods for teaching interviewing skills. Critiques by the assistants of each other and by the instructor should follow the demonstrations and exercises, so that understanding and sensitivity is increased.

Conference Skills--Assistants need to be trained to be effective in meetings and conferences because if they are to be as valuable as possible, they will inevitably be involved in many group discussions. They will need training in effective listening, in taking notes and writing summaries of meetings and conferences, in contributing suggestions and ideas in group discussions, in presenting challenges and questions, in making public presentations, and in leading meetings and conferences.

Therefore, it is suggested that the professionals take advantage of every opportunity to take their assistants to meetings or conferences with them, at first just to listen, observe, and learn. After each meeting, the assistants will benefit immensely from a critique session with the professional, in which the worth and progress of the meeting is fully analyzed and discussed, and during which the assistants can get answers to questions that remain in their minds. As soon as the assistants have built up sufficient self-confidence and understanding of the questions and issues

involved, they should be encouraged to start participating by asking questions at the meetings and by voicing their views, opinions, and suggestions.

Once the assistant has learned to be an effective participant or member of a discussion group, it is recommended that leadership training begin. This can start with speech and diction improvement where needed. Training in public speaking and conference leadership, and some drill in parliamentary procedures are very important in leadership preparation.

It is important that program assistants be introduced to at least some of the technical terminology used in the field in which they are working. The professional involved can and should help the assistants to start building a technical vocabulary in their field early in their training.

The assistants should be taught by the professionals and others to use the library card catalogues and periodical indexes, and should be encouraged to read some books and articles of their own selection.

As the assistants develop and improve their reading and writing skills, the professionals can add variety to the program by asking the aides to write summaries or critiques of what they have studied, or make up test questions on the materials covered. This will help to identify areas in which the assistant is having difficulty or failing to grasp the content of the materials.

To the extent that time, funds and resources are available, the professional staff should be encouraged to assist with the preparation of special written materials and manuals which will be helpful to the assistants in learning about all aspects of the program and the assignments they have and will be given to perform.

The assistants will respond most energetically and conscientiously to a directed study program in which the assignments are related to their

planned progress. A career plan which directly relates job progress to training progess will positively influence the extent to which employees will participate in and benefit from the program.

Resource Materials

C. EVALUATING PERFORMANCE AND PROGRESS

Periodic well-planned and thoughtfully carried out evaluations of performance and progress are essential in helping any staff member to move on to work of greater complexity and responsibility. Evaluations should be made regularly for all staff.

The New Employee

A comprehensive evaluation should be made of each new employee at the end of the first month of employment, or shortly before the end of a predetermined probationary period.

This initial evaluation should provide as much objective data as possible on the individual's need for his growth and development. It should include an assessment of his level of educational achievement, a comprehensive physical examination and an evaluation of how well he has performed duties and tasks assigned during the initial period of work.

Assessment of Educational Achievement--The purpose of making an assessment of educational achievement is to obtain a base from which to plan needed improvements in reading, writing and computational skills. Some employees will have been out of school many years. They may have attended inferior schools. Therefore, the number of school grades completed will not reliably indicate current actual level of educational achievement.

Public schools will have readily available batteries of standardized diagnostic tests which can be used to obtain indications of the general reading, vocabulary and computational skill levels of program assistants.

Where these are not normally available, the services of an educational psychologist may be desirable to provide and administer such tests.

If important weaknesses are revealed, remedial steps should be planned. The individual might, for example, be enrolled in adult education courses available through the local public schools, or a self study program might be inaugurated to bring about improvements in these basic skills. This may be supplemented by tutoring by volunteers or other program assistants during or after working hours.

Physical Examinations--Physical examinations are important not only to identify the presence of any communicable diseases, but to indicate any health problems that may interfere with job performance and full career development.

Initial Performance Evaluation and Career Planning Session--It is recommended that at the end of the new employee's probationary period a careful initial performance evaluation be made. This analysis, together with information developed on health and basic education needs, will provide an excellent basis for counseling and career planning.

To the extent that professional counselors are available, their services will prove helpful in assisting employees to arrive at some career planning decisions. For example, each employee should be assisted and encouraged to select his target career job toward which he would like to work--but the decision should not be forced. Any career plan should reflect first and foremost the desires and interests of the employee, and he should feel free to change his plan as his training and experience enrich his store of experience and knowledge. In addition to the help of professional counselors, the employee's supervisor, whether a teacher, social worker,

nurse, physician, or other individual should play a major role, as friend and advisor, in the development of career goals and plans. Those who supervise the employee and who are in daily contact with him are often in the best position to recognize his potential, judge his performance, and help train him to reach new levels of performance.

Evaluation Forms

Performance evaluations should be regular and comprehensive. Forms for use in making both initial and periodic evaluations are highly desirable. They serve as check lists so that important points will not be overlooked. However, evaluation forms do not substitute for the regular informal counseling by the employee's supervisor and indepth discussions with professional counselors and others whose continued efforts are essential to the maximum development of each employee. At best, evaluation forms serve as guides and reminders upon which judgments can be made systematically and conveniently.

Two forms are suggested here, a self-appraisal form which employees can be invited to complete in preparation for a progress and planning discussion with their supervisor, and a supervisor's evaluation form, which will help prepare the supervisor for the discussion and serve as a means of keeping track of progress.

The Self-Appraisal--As part of the initial evaluation it will usually be helpful to have the individual do some careful thinking about himself, in terms of the job, his developmental needs, desires and ambitions. It is recommended that this self evaluation not be required, but offered, and that it be kept informal. When the time for initial evaluation is near, the employee's supervisor can explain its purpose, help him understand

that some advance thinking about himself can help to make the evaluation discussion more beneficial.

It is better if the employee fills the form out at home, rather than at work. He should have some time to think about his answers to the questions and not be under the pressure of an immediately pending interview. The self-appraisal should be presented in the context of planning for the employee's future.

The self-appraisal exercise has two main purposes: First, to encourage the individual to begin thinking about himself and his need for improvement and development. The second purpose is to establish a bridge between how the employee feels about himself and his needs and the progress and planning discussion with his supervisor.

The form shown on the next page is suggested for use with new program assistants, to be completed by them before the progress and planning discussion with their supervisor. Naturally, if the employee has a low level of ability to read and write, he will need assistance in completing the form. Even employees who have a fairly good formal education but whose worldly experiences have been narrow will not in all cases interpret the questions correctly. They will probably skip some, and perhaps give inappropriate or irrelevant answers to others. It is recommended that such omissions or mistakes not be criticized or made issue of.

The first questions on the form, concerning date employed and family are, of course, not self-appraisal questions. They are intentionally put in as simple, easy-to-answer questions, designed primarily to help get the employee started. Then the form builds gradually to more thought-provoking questions.

Whatever the employee's answers are to the self-appraisal questions, they should be accepted without criticism or evidence of disappointment. He should not be required to re-do it in order to make it more complete or more meaningful. The self-appraisal form can be used as the starting point of the discussion between the employee and his supervisor.

Staff Development Program
SELF-APPRAISAL FORM

Name_____Title_____Date_____

The purpose of this form is to help you think about yourself in relation to the job you have now, and your future. Putting thoughts in writing helps one to think more carefully, and to express feelings and desires in a clear, organized way. When you have finished, your supervisor will review and discuss your answers with you. This will help both of you to increase your chances for success and advancement.

1. About what date did you begin working in your present job?_____

2. Do you or your family have any health, physical or dental problems for which you would like to get treatment?_____

3. Are you satisfied with your education, or would you like to improve it in some way?_____

4. What are some of the things you feel you have learned since you have been employed here?_____
_____

5. What do you like most about your work?_____
_____

6. Is there anything you don't like about your work?_____
_____

7. Is there anything you need that you feel would help you do a better job?
_____

8. Are you satisfied with the type of assignments you are performing? Are there some things you do that you would like to learn more about, or learn to do better?_____
_____

9. Are there some new things you would like to learn to do as part of your work?_____
_____

10. Would you like an opportunity to get more training? If so, in what subjects?_____
_____

11. Is there a different job, in another line of work, here or in another place that you would like to have?_____
_____

12. Other comments:_____
_____

The Supervisor's Evaluation--Instruction, guidance, criticism and encouragement should be continuing aspects of the relationship between supervisor and employee. The concept of periodic evaluations of development and performance and of progress and planning discussions in no way obviates or supplants the need for the supervisor continually to assess performance and help employees develop on a daily basis.

Local programs may desire to design a supervisor's evaluation form that they feel best suits their needs. The one provided here is relatively simple and has several good features.

In Section (A) the individual is evaluated directly with respect to his personal traits, such as reliability, initiative, and so forth. These judgments also indirectly reflect evaluation of the employee's overall performance of his tasks or assignments including those which he is learning and responsibilities for which he is being developed.

Section (B), on the other hand, provides for rating employees directly on the basis of the tasks or assignments they are performing. "Tasks" suggests breaking the job down beyond broad identification of "duties," such as "clerical work" or "home visits" and short of such detailed steps or "motions," such as "distribute materials" or "collect blocks and toys."

In rating the employee on the basis of his ability to perform each specific assignment or task, the rater inevitably also takes into account personal traits, such as reliability, initiative, and judgment. Thus, in evaluating the employee from two points of view--1) traits and attitudes, and 2) work performance--the supervisor obtains a cross-check of his judgments.

Some employees may work for or be under training by more than one person. For example, Community Assistants often receive training in family

health problems by qualified medical staff members, training in social services by others, etc. In these instances, all who supervise the employees' work or contribute regularly to their training and development may have useful comments and suggestions to make on individual employee progress and additional developmental needs. Where program directors or other key staff personnel have direct knowledge of the employee's work, it is recommended that they also participate in an evaluation conference on the employee.

Staff Development Program
SUPERVISOR'S APPRAISAL FORM

(A) PERSONAL TRAITS AND ATTITUDES

Factors	Outstanding	Very Good	Improvement Needed
Punctuality			
Attendance			
Personal neatness			
Friendliness			
Willingness			
Reliability			
Accuracy			
Relations with parents			
Relations with children			
Relations with others			
Initiative			
Cooperation			
Judgment			
Imagination			
(Other)			
(Other)			
(Other)			

(B) ASSIGNMENTS OR TASKS

Identify Assignments or Tasks Performed	Outstanding	Very Good	Improvement Needed
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

The Progress And Planning Discussion

Planning for a Discussion with the Employee--Carefully completed supervisor's evaluation forms and employee's self-appraisal forms are valuable aids in planning progress discussions with employees. They help to identify systematically the employee's performance and progress problems. However, those who have worked with employee evaluations for many years generally agree that the most common error made by supervisors is discussion of too many weaknesses with an employee all at one sitting. A well-planned, low-pressure, uncomplicated evaluation discussion leaves both supervisor and employee gratified. When evaluations are properly and effectively carried out, the employee's performance keeps improving. This enhances his future earning power, and the supervisor benefits because the employee becomes more and more valuable to him. It is suggested that the supervisor's evaluation form be considered mainly as his "think piece" and planning tool and that it not be used to present to an employee "formal evidence" of all his mistakes or shortcomings.

Some supervisors may feel the supervisor's evaluation form should be shown to and discussed in detail with the employee, and will do so. However, even if skillfully handled, this can have a harmful effect on employees, particularly those who are new and who are just beginning to make progress. However, at the close of the progress and planning discussion, an informal summary of points discussed and improvement actions to be taken can advantageously be developed jointly by the supervisor and employee. This summary, instead of the evaluation form, can then be made part of the employee's record.

Set the stage and tone of the discussion, and you are ready to get the assistant's reaction to your identification of what you feel to be the problem of "weakness" in his work.

Getting the Employee's Reaction--Your next objective should be to find out the extent to which the individual agrees that this is a problem. He may be able to make points in self-defense that may change some of your views. The course of action that you then decide on, or eventually agree on, may therefore be influenced by the employee's attitude and the statements he makes about the problem.

The employee may, of course, say that he does not agree. He may or may not offer any logical reasons for his disagreement. He may talk emotionally about the matter, but without definitive facts or points which support his disagreement. The disagreement may be a projection of the individual's defensiveness, rather than a valid disagreement. However, it is extremely important that employees be encouraged to speak their minds freely and to express any feeling without fear of reprisal or intimidation.

If the employee feels critical of the sponsor, the program, policies, pay, benefits, job requirements or is upset about any matter related to the program or a personal matter, he certainly should have the right to a sympathetic, helpful response on the part of the individual responsible for his work and his development. These discussions should be two-way affairs, with supervisor and employee leveling with each other in a direct, honest way to build a better relationship and ensure effectiveness. However, when the employee disagrees with a supervisor's criticism, but has no acceptable reason for his position, the supervisor will usually need to proceed to develop a plan.

Encouraging the Employee to Suggest How He Can Act to Overcome the Problem--When the employee agrees with the supervisor's statement of a performance problem, or developmental need, or disagrees but makes no point, the next objective should be to get him to think out possible constructive answers and solutions to his problem. This approach recognizes that any valid long-term solution will best originate from within the individual, if at all possible, rather than being imposed from without.

Sometimes an employee, through inexperience or emotion, will simply not be able to make a satisfactory suggestion for improvement, or may suggest a highly impractical one. If one suggestion isn't acceptable, the supervisor should try to get another and not become discouraged too easily. The exercise of thinking constructively about how he can do better, how he can improve himself, is an important developmental first step for the employee.

Near the close of the progress and planning discussion, it is recommended that the supervisor and the employee review together the employee's career progression plan record. This record should set forth training and development goals to be attained over specific periods, such as every six to twelve months.

At the end of the discussion, the chief points covered should be summarized in writing. This summary should include mention of weaknesses discussed, plans and actions developed and commendatory statements made. The summary should generally not exceed one hand-written page. With the employee's knowledge of its contents, and his signature, it can be made a part of the employee's file or record. If the employee wants to have a copy, it is a simple matter to slip in a piece of carbon paper and an extra sheet before beginning to write the summary. In the event the

employee objects to statements made in the summary and the supervisor feels they should not be changed, the employee should be advised of his right to appeal the matter to the next higher level of supervision.

Closing the Discussion on Good Terms--The supervisor should make sure that the employee does not leave the discussion in low spirits, particularly if it has been necessary to be critical. By mentioning again some of his good points in closing, and reassuring him of his ability to improve and to keep on progressing, the supervisor will greatly increase the probability that these discussions will be a desirable experience for the employee and himself.

Performance Tests

Performance tests or experience requirements should be coupled with oral or written tests whenever practicable, because the assistant should not only know his subject but must also be able to put the knowledge to practical and satisfactory use. While self-study materials can lessen demands on a professional's time in imparting knowledge to the assistant, the development of skills will require demonstrations, tutoring and coaching by the professional, or other qualified person, such as a highly skilled assistant to a professional.

Performance tests or experience criteria can be set up for virtually every skill incorporated in a career progression plan. The teacher or other qualified person should judge the test performance strictly. Assistants will respect the program more, and obtain greater benefits from it, if the person responsible for their development does not let them slide by on shoddy or unskillful performances.

Individual Records of Experience and Training

It is suggested that a simple career progress plan record card be set up to document the training and experience gained by each assistant to qualify for advancement. This will be of particular value as time goes on and assistants work in different centers, under different professionals, and in successive programs. A sound, well administered career progression plan will produce substantial benefits to all concerned. Such a plan will not succeed if it is poorly administered, if training and experience are not provided as scheduled or if assistants are advanced from one level to the next on the basis of guess work and completely subjective judgments. Professionals must devote time to the evaluation of their assistants, to planning career development with them, to seeing that they get the training and experience they need and to ensuring that they have obtained needed knowledge and can apply required skills with a reasonably satisfactory degree of proficiency.

REFERENCE MATERIALS

The following materials are available from the Information Clearinghouse, National Institute for New Careers:

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3. A Manual of Organization and Development: Sourcebook for Trainers. Klein, William; Denham, William; and Fishman, Jacob R.

4. Generic Issues in the Human Services: A Sourcebook for Trainers. Shatz, Eunice, and Fishman, Jacob R; and Klein, William.

5. Generic Issues in the Human Services: A Manual for Trainees. Shatz, Eunice, and Fishman, Jacob R.

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7. The Community/Home Health Aide Trainee's Manual. Hicks, Florence.

8. The Social Service Aide: A Sourcebook for Trainers. Goldberg, Gertrude S., et al.

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OTHER REFERENCES:

1. Project TLC: A Model Community Action Program to Employ Older People as Aides to Work With Very Young Children, New York: National Council on the Aging, 1966, 12 pp.

2. Manual on the Training of Day Care Aides, Washington: Howard Univ., 1966, 30 pp.

3. Hromadka, Van G., Child Care Worker on the Road to Professionalization, New York: Hawthorne Center for the Study of Adolescent Behavior, Jewish Bd. of Guardians, 1966, 48 pp.

4. Riessman, Frank, "Issues in Training the New Non-Professional," Washington: Subcommittee on Training, National Manpower Advisement Commission, 1967.

5. Career Planning and Development of Nonprofessionals: Head Start Child Development Centers, Washington: Manpower Evaluation and Development Institute, 1967, 168 pp.

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7. Evarts, Harry F., Introduction to PERT, Allyn and Bacon, Inc., Boston, 1964.

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9. Wiley, Wretha. Six Steps to New Careers: A Systems Approach to Job and Career Design. Washington, D.C.: The W. E. Upjohn Institute for Employment Research, June 1969.

10. OEO Training Manuals 6321-1 and 6321-2, PERT for CAA Planning, A Programmed Course of Instruction in PERT.

11. Richard I. Levin and Charles A. Kirkpatrick. Planning and Control with PERT/CPM. New York: McGraw-Hill Book Co., 1966.

TASK COMPLETION FORMS AND BLANK PLANNING CHARTS

One of the Task Completion Forms on the following pages is to be filled out and mailed every second Monday to the National Institute for New Careers, University Research Corporation, 4301 Connecticut Avenue, Washington, D.C., 20008. Enough forms are provided to enable you to make a carbon copy of each for your own records. For a description of the way the Task Completion Forms are to be used, see the Introduction to this workbook and Chapter Five. Remember that their only purpose is to help technical assistants provide the best possible service to your career development effort.

Immediately following the Task Completion Forms are the blank charts you will use to plan your career development effort as described in Chapters Four and Five. The PERT charts that you design will not be used to judge or rate your career development planning and program implementation. They are for your use only, and will be used for one purpose -- to assist you in conducting career development in an orderly fashion and completing all the tasks to be done in the amount of time provided.

TASK COMPLETION FORM

1. What tasks were projected for this period?

   New:

   Continuing:

2. Which of the new tasks were actually initiated?

3. What progress was made on the continuing tasks?

4. Which tasks, new or continuing, were not carried out?

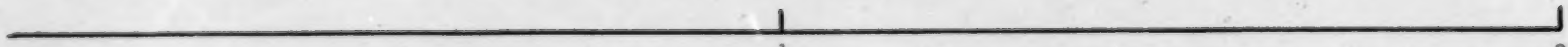
5. In what task areas is technical assistance needed? (Please specify type of assistance needed -- phone call, onsite visit, publications, or assistance in next workshop. Also indicate whether the need is for general TA or for a specialist in a specific career field, i.e., health, child care, legal services.)

6. What was the most positive experience that occurred in your attempt to complete the projected tasks? To what do you attribute this success?

7. What was the most negative experience during the two-week period? Why?

8. Please state briefly your projected tasks for the next two weeks. Do you anticipate any difficulties?

TWO-MONTH PLANNING CHART



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